



 **BizIntuit**  
STREAMLINING THE BUSINESS PROCESS

# MODULE

- **Dashboard**
  - Private Dashboard
  - Advanced Dashboard
- **Leads Management**
  - Leads Contacts Manage
  - Deals Manage
- **Client Management**
- **HR Management**
  - Employee Management
  - Leaves Management
  - Attendance Management
  - Holiday
  - Designation Management
  - Department Manage
  - Appreciation manage
- **Work Management**
  - Contracts Manage
  - Projects Manage
  - Tasks Manage
  - Timesheet manage
  - Project Roadmap
- **Finance Managements**
  - Proposal
  - Estimates
  - Invoices
  - Payments
  - Credit Note
  - Expenses
  - Bank Account

○ E-Invoice

- **Order Managements**
- **Tickets Managements**
- **Events Managements**
- **Message Management**
- **Notice Board**
- **Knowledge Base**
- **Assets**
- **Letter**
  - Generate Letter
  - Template Generate
- **Payroll Management**
  - Payroll
  - Employee Salary
  - Reports
- **Purchase Management**
  - Vendor
  - Products
  - Purchase
  - Order Bills
  - Vendor
  - Payments
  - Vendor
  - Credits
  - Inventory

○ Reports

- **QR Code**

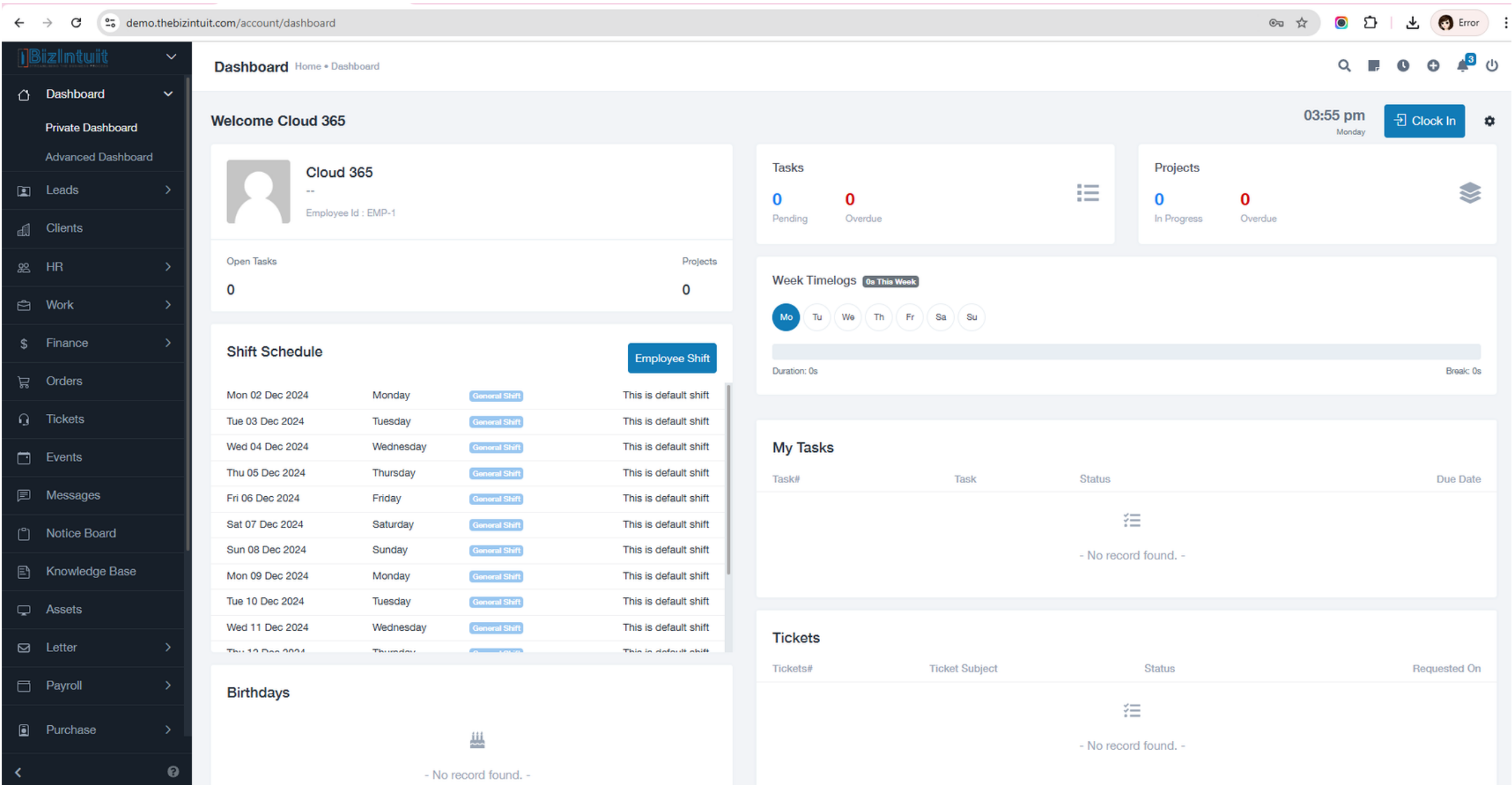
- **Recruit**
  - Dashboard
  - Job
  - Job Applications
  - Interview Schedule
  - Offer Letters
  - Skills
  - Candidate Database
  - Reports
  - Career Site
- **Report**
  - Task Report
  - Time Log
  - Report Finance
  - Report Income Vs Expense
  - Leave Report
  - Attendance Report
  - Expense Report
  - Deal Report
  - Sales Report
- **Zoom Meetings**

## Settings

- Company Settings
- Business Address
- App Settings
- Profile Settings
- Notification Settings
- Currency Settings
- Payment Credentials
- Finance Settings
- Contract Settings
- Tax Settings
- Ticket Settings
- Project Settings
- Attendance Settings
- Leaves Settings
- Custom Fields
- Roles & Permissions
- Message Settings
- Lead Settings
- Time Log Settings
- Task Settings
- Security Settings
- Theme Settings
- Module Settings
- Google Calendar Settings
- Custom Link Settings
- Asset Settings
- E-Invoice Settings
- Payroll Settings
- Purchase Settings
- Recruit Settings
- SMS Setting
- Zoom Settings
- Billing

# Dashboard

Dashboard provides a quick overview of Shift Schedule, Tasks, Projects ,performance, Birthdays, My Calendar etc.

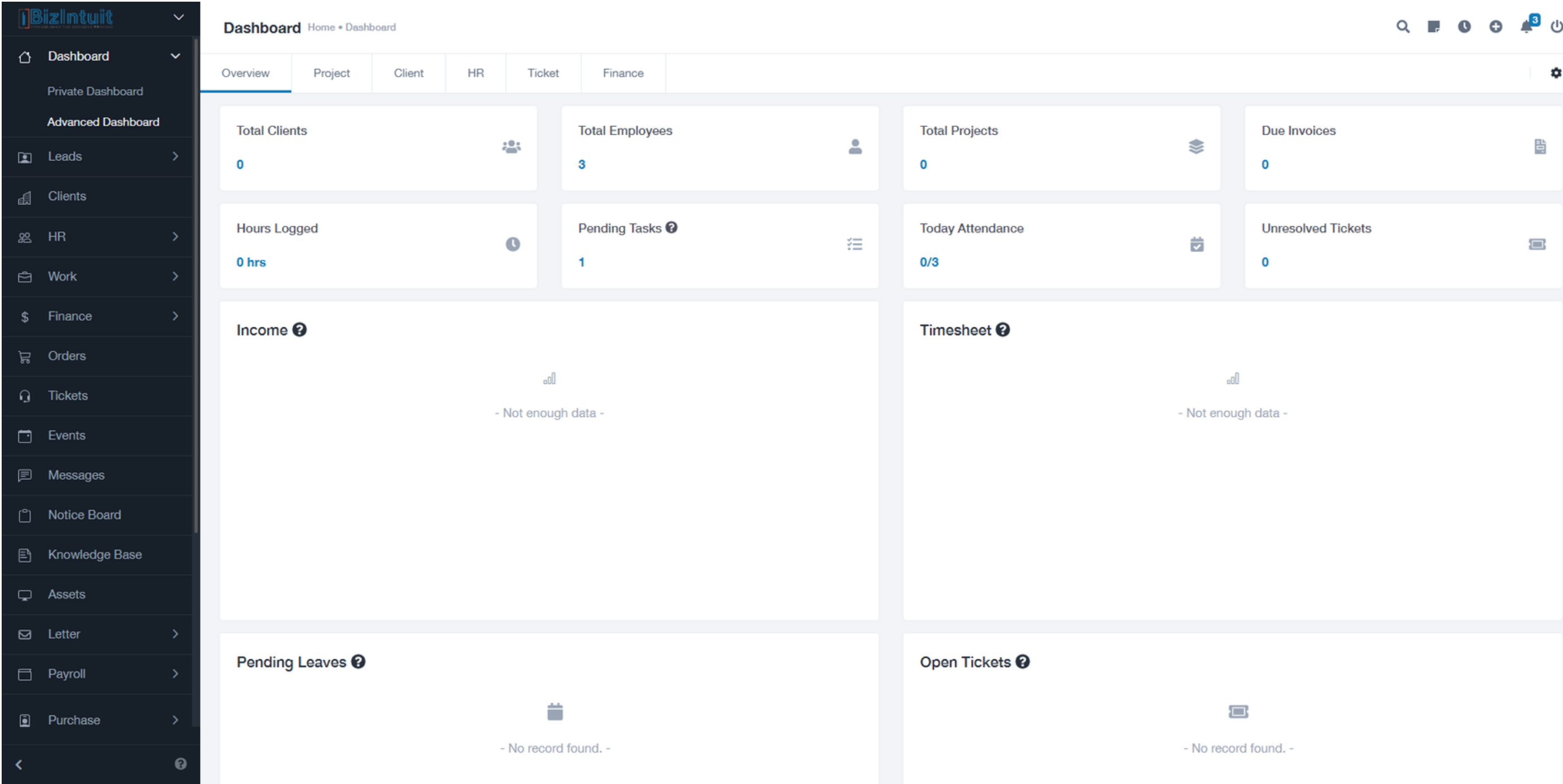


# Dashboard

## Two Type Of Dashboard

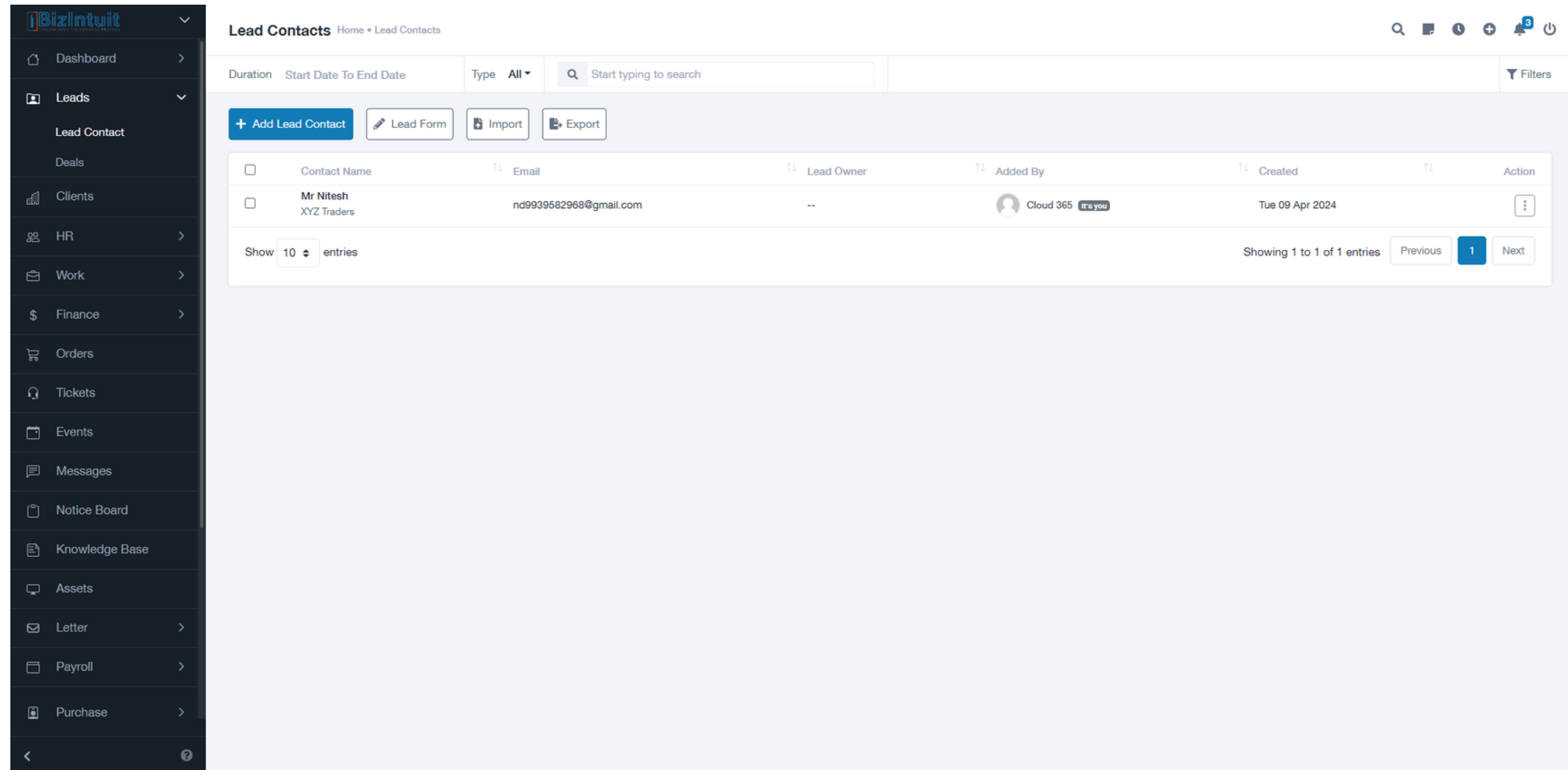
1.Private

2.Advanced



# Leads

[Lead Contacts Home](#) • [Lead Contacts](#)



# Leads

Deal Home • Deal

BizIntuit

Dashboard

Leads

Lead Contact

Deals

Clients

HR

Work

Finance

Orders

Tickets

Events

Messages

Notice Board

Knowledge Base

Assets

Letter

Payroll

Purchase

Deal Home • Deal

Duration

Start Date To End Date

PipelineSales Pipeline

CategoryAll

ProductAll

Start typing to search

Filters

+ Add Deal

Import

Export

	Deal Name	Lead Name	Contact Details	Value	Close Date	Next Follow Up	Deal Agent	Deal Watcher	Stage	Action
<input type="checkbox"/>	XYZ	Mr Nitesh XYZ Traders	nd9939582968@gmail.com	₹100,000.00	Thu 09 May 2024		--	--	Generated	

Show

10

entries

Showing 1 to 1 of 1 entries

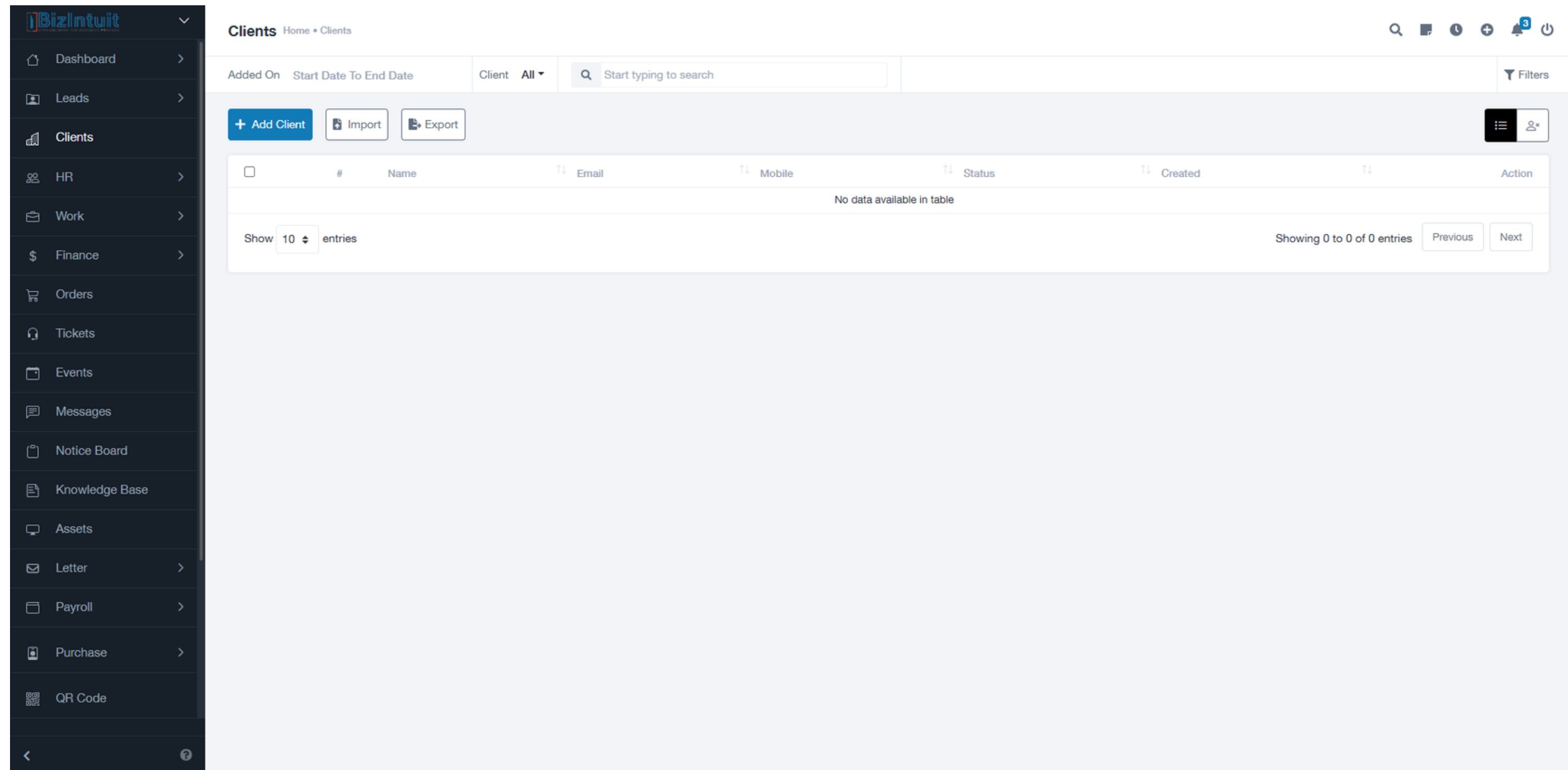
Previous

1

Next

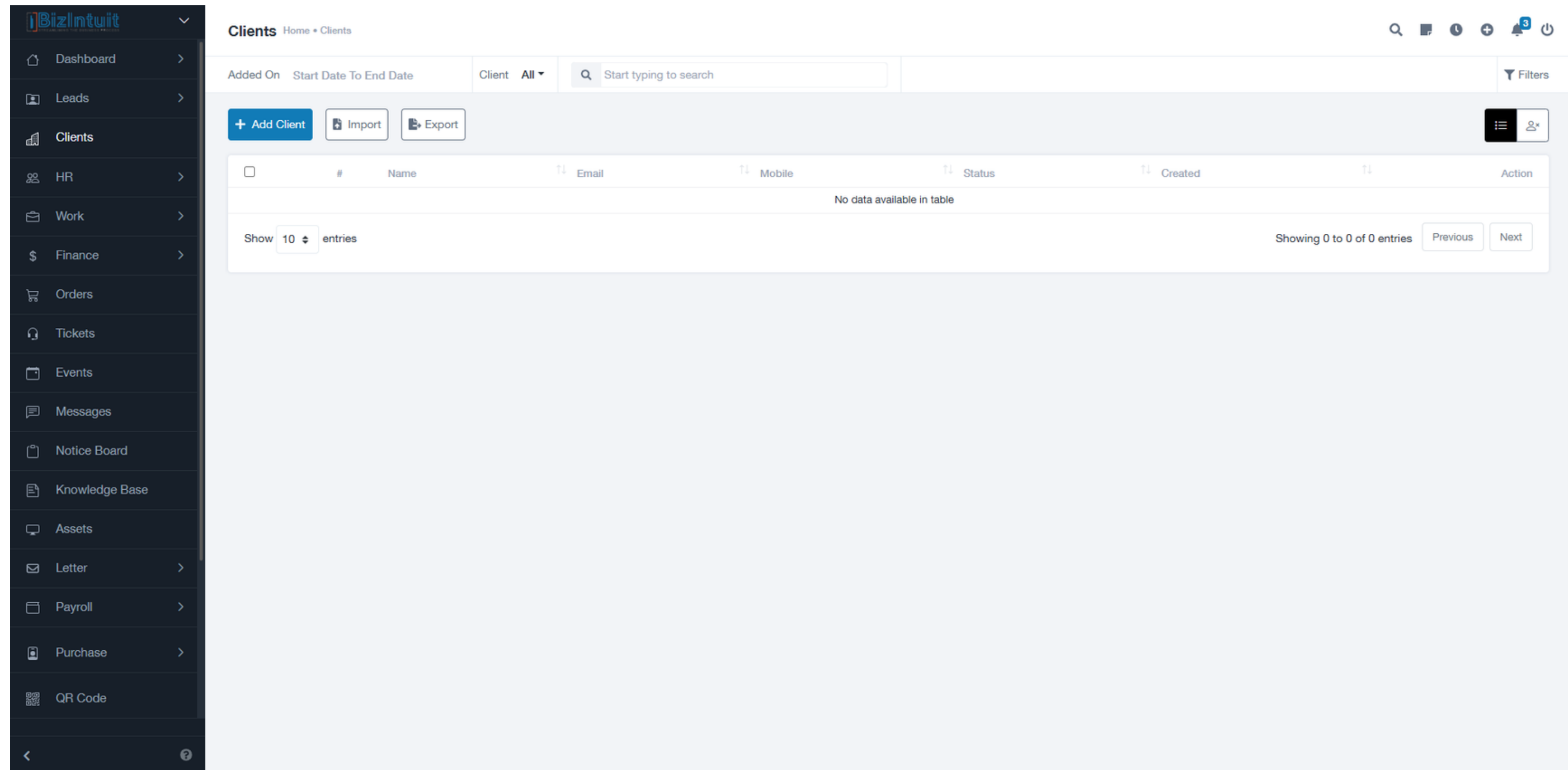
# Clients

You can add your clients here and import or export client data in XLS, XLSX, or CSV file formats.



# Clients

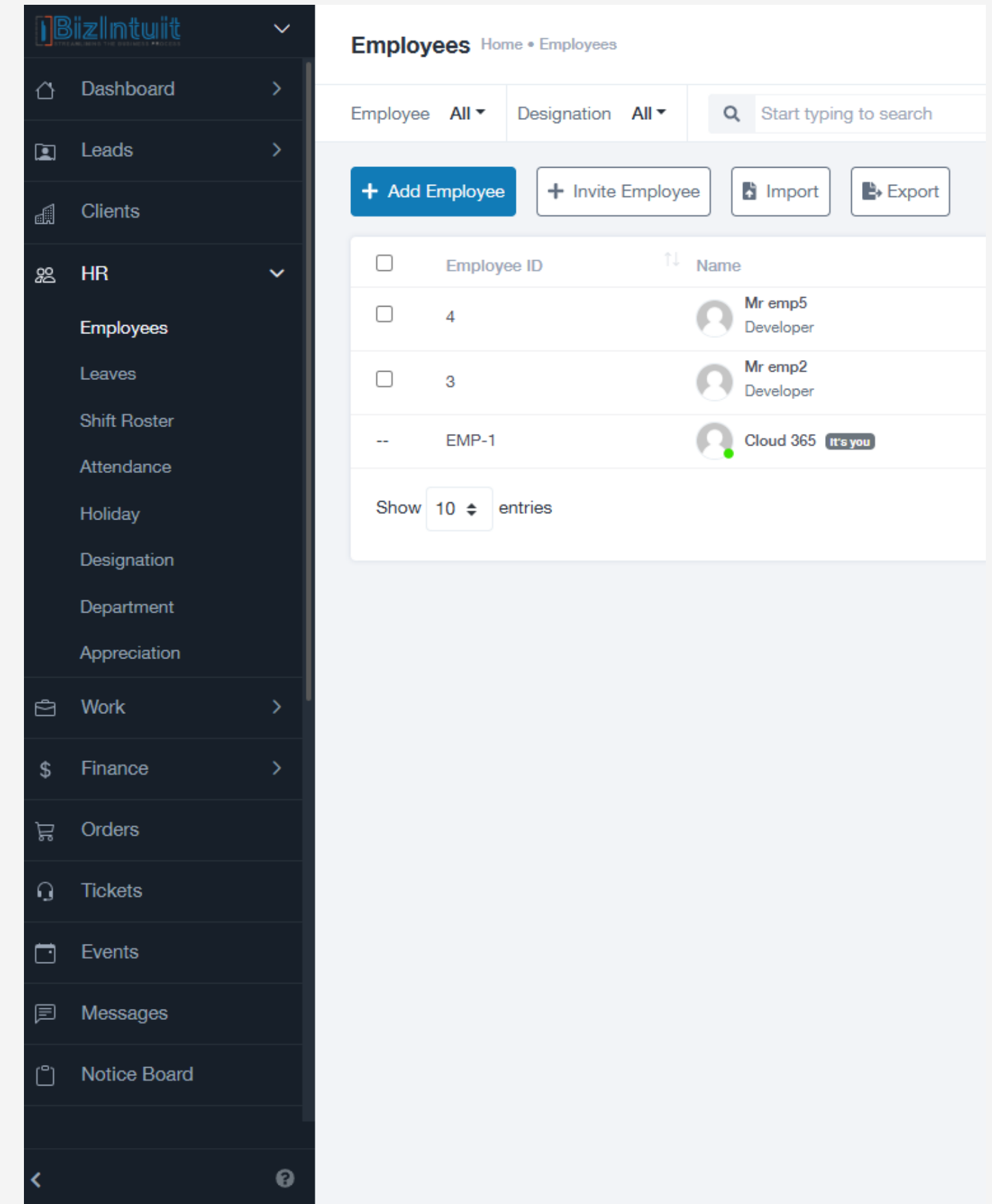
You can add your clients here and import or export client data in XLS, XLSX, or CSV file formats.



# HR

Under the HR tab, you can manage the following:

- Employees
- Leaves
- Shift Roster
- Attendance
- Holidays
- Designations
- Departments
- Appreciation



# Employees

Under the Employees tab, you can add and invite employees, as well as export the employee list to a spreadsheet.

The screenshot displays the 'Employees' management page in the BizIntuit application. On the left is a dark sidebar with navigation options: Dashboard, Leads, Clients, HR (expanded), Employees (selected), Leaves, Shift Roster, Attendance, Holiday, Designation, Department, Appreciation, Work, Finance, Orders, Tickets, and Events. The main content area is titled 'Employees' and includes a breadcrumb 'Home • Employees'. At the top right of the main area are icons for search, print, clock, plus, notifications (3), and power. Below the title bar, there are filters for 'Employee' (All) and 'Designation' (All), a search bar with the placeholder 'Start typing to search', and a 'Filters' button. A toolbar contains four buttons: '+ Add Employee' (blue), '+ Invite Employee', 'Import', and 'Export'. The central part of the page features a table with the following columns: Employee ID, Name, Email, User Role, Reporting To, Status, and Action. The table lists three employees: 'Mr emp5 Developer' (ID 4, email nishant.nwaresoft@gmail.com, role Employee), 'Mr emp2 Developer' (ID 3, email nware3001@gmail.com, role Employee), and 'Cloud 365' (ID EMP-1, email admin@cloud365.app, role App Administrator, with a green dot and 'It's you' label). All employees have a status of 'Active' (green dot). Each row has an 'Action' column with a three-dot menu icon. At the bottom of the table, there is a pagination section showing 'Showing 1 to 3 of 3 entries' and buttons for 'Previous', '1' (selected), and 'Next'. A 'Show 10 entries' dropdown is also present.

Employee ID	Name	Email	User Role	Reporting To	Status	Action
4	Mr emp5 Developer	nishant.nwaresoft@gmail.com	Employee	--	Active	
3	Mr emp2 Developer	nware3001@gmail.com	Employee	--	Active	
EMP-1	Cloud 365 It's you	admin@cloud365.app	App Administrator	--	Active	

# Leaves

In the Leaves section, you can review new leave requests and export leave data to a spreadsheet.

The screenshot displays the 'Leaves' section of the BizIntuit HR system. The sidebar on the left contains navigation links: Dashboard, Leads, Clients, HR (expanded), Employees, Leaves, Shift Roster, Attendance, Holiday, Designation, Department, Appreciation, Work, Finance, Orders, Tickets, Events, Messages, and Notice Board. The main content area is titled 'Leaves' and includes a search bar, filters, and a table. The table has columns for Employee, Leave Date, Duration, Leave Status, Leave Type, Paid, and Action. The table currently displays 'No data available in table'. Below the table, there is a pagination control showing 'Showing 0 to 0 of 0 entries' and buttons for 'Previous' and 'Next'.

# Shift Roster

Under the Shift Roster, you can view the shifts worked by employees across all departments and at any given time.

The screenshot displays the BizIntuit Shift Roster interface. On the left is a dark sidebar with navigation links: Dashboard, Leads, Clients, HR (expanded), Employees, Leaves, Shift Roster, Attendance, Holiday, Designation, Department, Appreciation, Work, Finance, Orders, Tickets, and Events. The main content area is titled 'Shift Roster' with a breadcrumb 'Home • Shift Roster'. It includes filters for 'Employee' (All), 'Department' (All), and 'Weekly View'. Action buttons for '+ Assign Bulk Shifts' and 'Export' are present. A date range selector shows '02 Dec - 08 Dec'. A legend indicates 'GS : General Shift' and '★ : Holiday'. The roster table lists three employees: 'Cloud 365' (marked 'It's you'), 'emp2 Developer', and 'emp5 Developer'. Each employee has a row of seven cells, one for each day from Monday to Sunday, each containing a blue plus icon for shift assignment.

Employee	2 MONDAY DEC	3 TUESDAY DEC	4 WEDNESDAY DEC	5 THURSDAY DEC	6 FRIDAY DEC	7 SATURDAY DEC	8 SUNDAY DEC
Cloud 365 <span>It's you</span>	+	+	+	+	+	+	+
emp2 Developer	+	+	+	+	+	+	+
emp5 Developer	+	+	+	+	+	+	+

# Attendance

Under the Attendance section, you can track and manage employee attendance, including checking in and out times, absences, and overall attendance records.

BizIntuit

Dashboard

Leads

Clients

HR

Employees

Leaves

Shift Roster

Attendance

Holiday

Designation

Department

Appreciation

Work

Finance

Orders

Tickets

Events

Messages

Attendance

Home • Attendance

Employee All Department All Designation All Month December Year 2024

Mark Attendance

Import

Export

Note: ★ → Holiday | 🗓 → Day Off | ✓ → Present | ☆ → Half Day | ⚠ → Late | ✕ → Absent | 🛖 → On Leave

Employee	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Total
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	
<div>Cloud 365</div> <div>it's you</div>	✕	✕	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0 / 31	
<div>emp2</div> <div>Developer</div>	✕	✕	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0 / 31	
<div>emp5</div> <div>Developer</div>	✕	✕	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0 / 31	

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NWARESOFT

# Holiday

The Holiday section now allows you to add and manage employee holidays.

The screenshot displays the BizIntuit Holiday management interface. On the left is a dark sidebar with navigation links: Dashboard, Leads, Clients, HR (expanded), Employees, Leaves, Shift Roster, Attendance, Holiday (selected), Designation, Department, Appreciation, Work, Finance, Orders, Tickets, Events, Messages, and Notice Board. The main content area is titled 'Holiday' and includes a search bar, '+ Add Holiday' button, and 'Mark Default Holidays' checkbox. Below these is a calendar for December 2024, showing days of the week (Mon-Sun) and dates (1-31). The calendar is currently in 'month' view. The date 2nd is highlighted in grey.

Mon	Tue	Wed	Thu	Fri	Sat	Sun
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22

# Designation

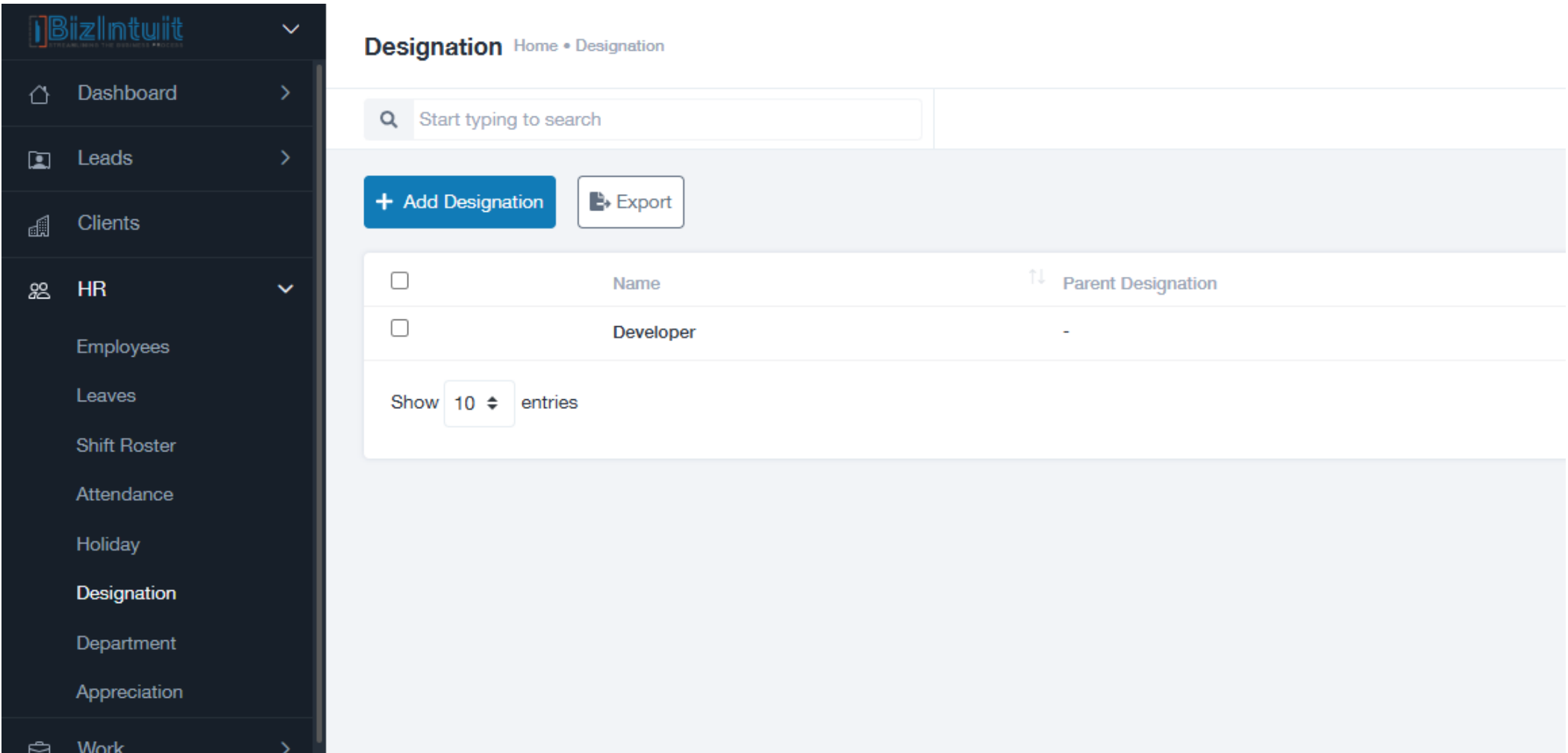
Under the Designation tab, you can manage the following:

- Adding and managing employee designations.
- Linking designations to specific roles or departments.
- Tracking designation history for each employee.

The image displays the BizIntuit Designation management interface. On the left is a dark sidebar menu with the BizIntuit logo at the top. The menu items are: Dashboard, Leads, Clients, HR (expanded), Employees, Leaves, Shift Roster, Attendance, Holiday, Designation (highlighted), Department, and Appreciation. The main content area is titled 'Designation' with a breadcrumb 'Home • Designation'. It features a search bar with the placeholder 'Start typing to search', a blue '+ Add Designation' button, and a white 'Export' button. Below these is a table with two rows: one with a checkbox and the text 'Name', and another with a checkbox and the text 'Developer'. A 'Show 10 entries' dropdown is also present. An 'Add Designation' modal is open in the bottom right, showing a form with a 'Name' field (marked with a red asterisk) containing the text 'e.g. Team Lead'. At the bottom of the modal are 'Save' and 'Cancel' buttons. The sidebar menu in the modal view shows 'Designation' as the selected item.

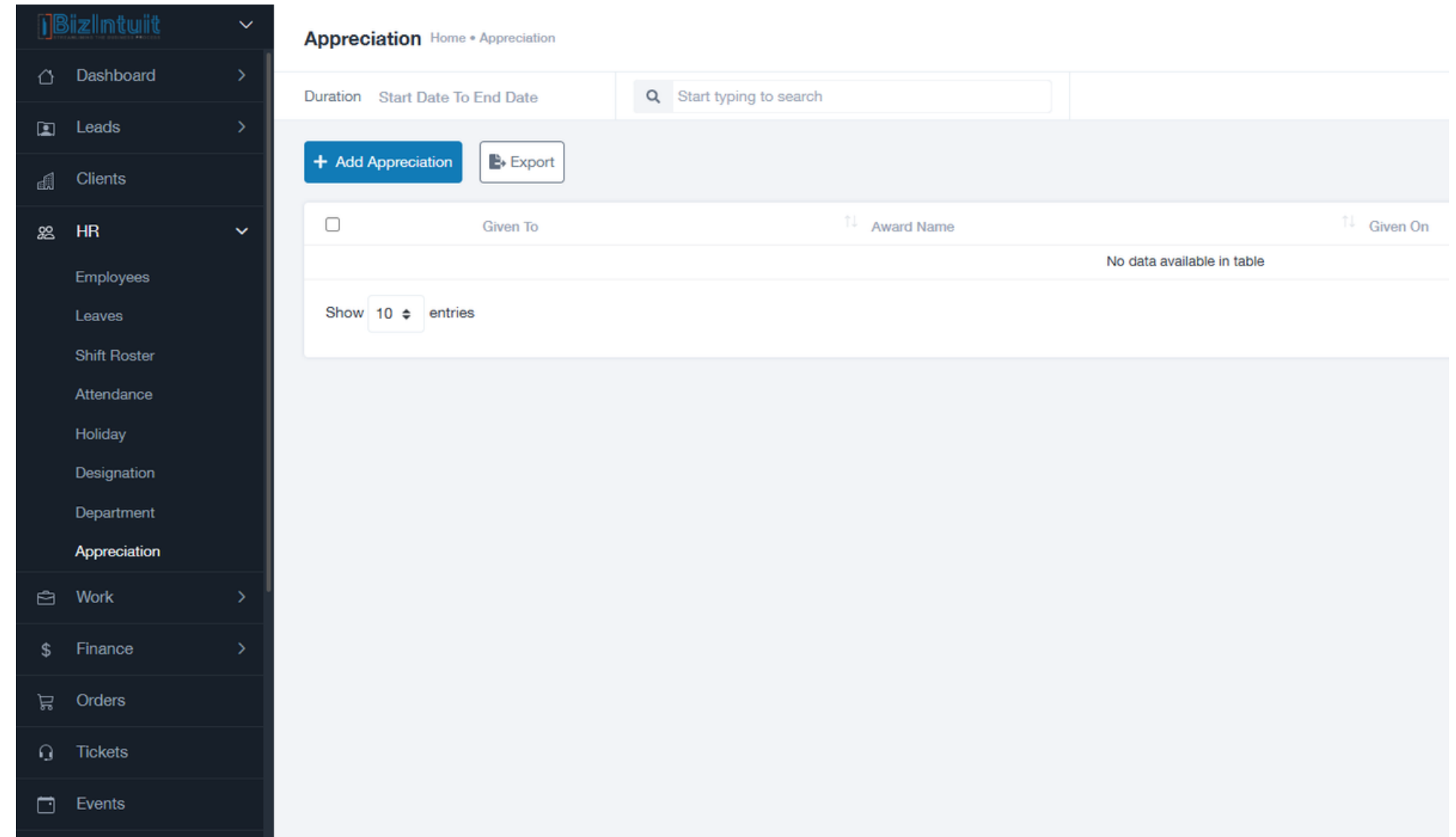
# Department

The Department section now supports adding departments and exporting them to a sheet.

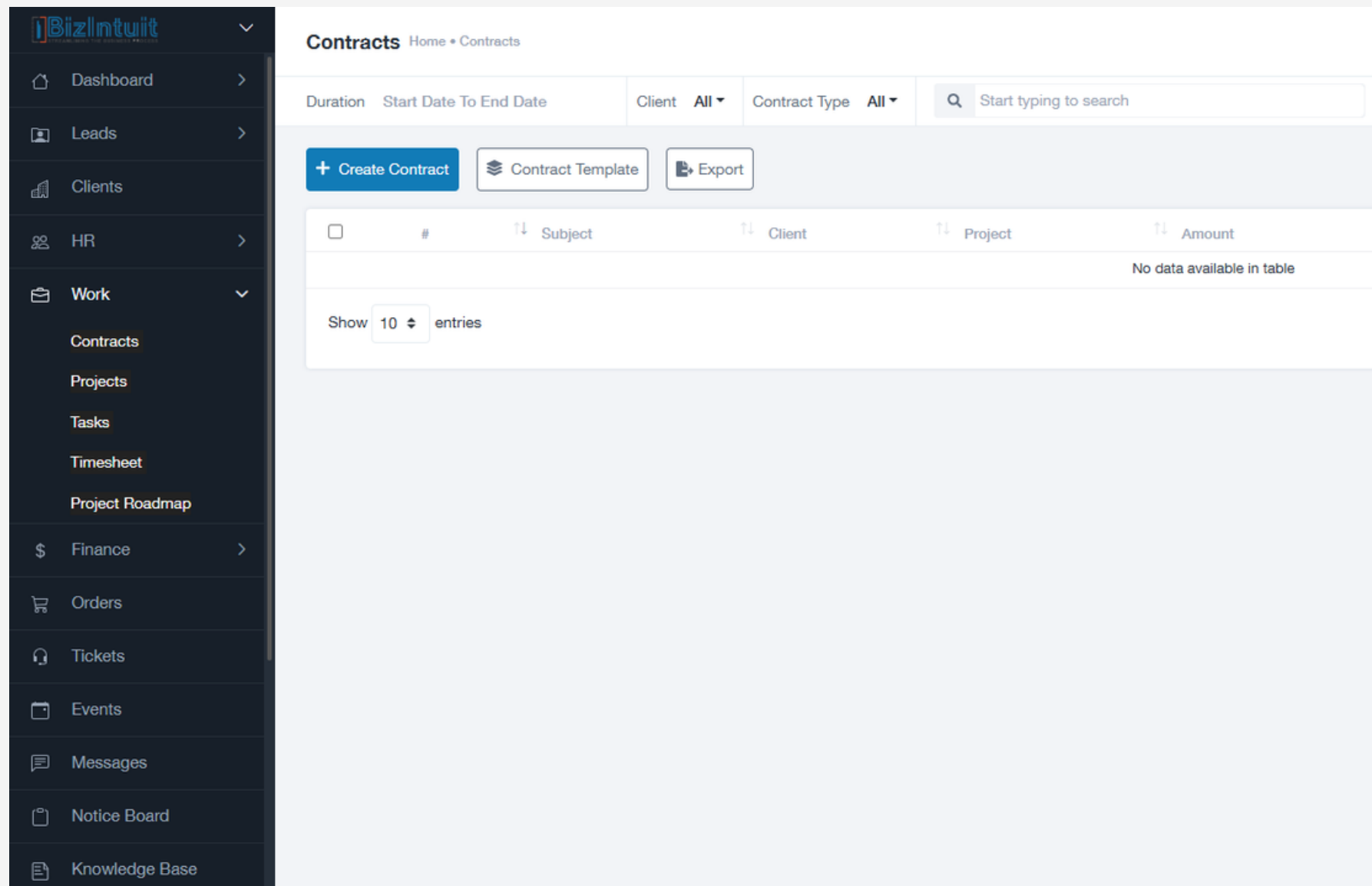


# Appreciation

The Appreciation section now includes the ability to add employee recognition and export it to a sheet.



# Work



Work" tab that includes sections for managing:

- Contracts
- Projects
- Tasks
- Timesheet
- Project Roadmap

# Contracts

In the Contracts section, you can create contracts, use existing templates for contract creation, and export templates as needed.

BizIntuit

Dashboard

Leads

Clients

HR

Work

- Contracts
- Projects
- Tasks
- Timesheet
- Project Roadmap

Finance

Orders

Tickets

Events

Messages

Notice Board

Knowledge Base

Contracts Home Contracts

Duration Start Date To End Date Client All Contract Type All Start typing to search

Create Contract

Contract Template

Export

	#	Subject	Client	Project	Amount	Start Date	End Date	Action
No data available in table								

Show 10 entries

Showing 0 to 0 of 0 entries

Previous

Next

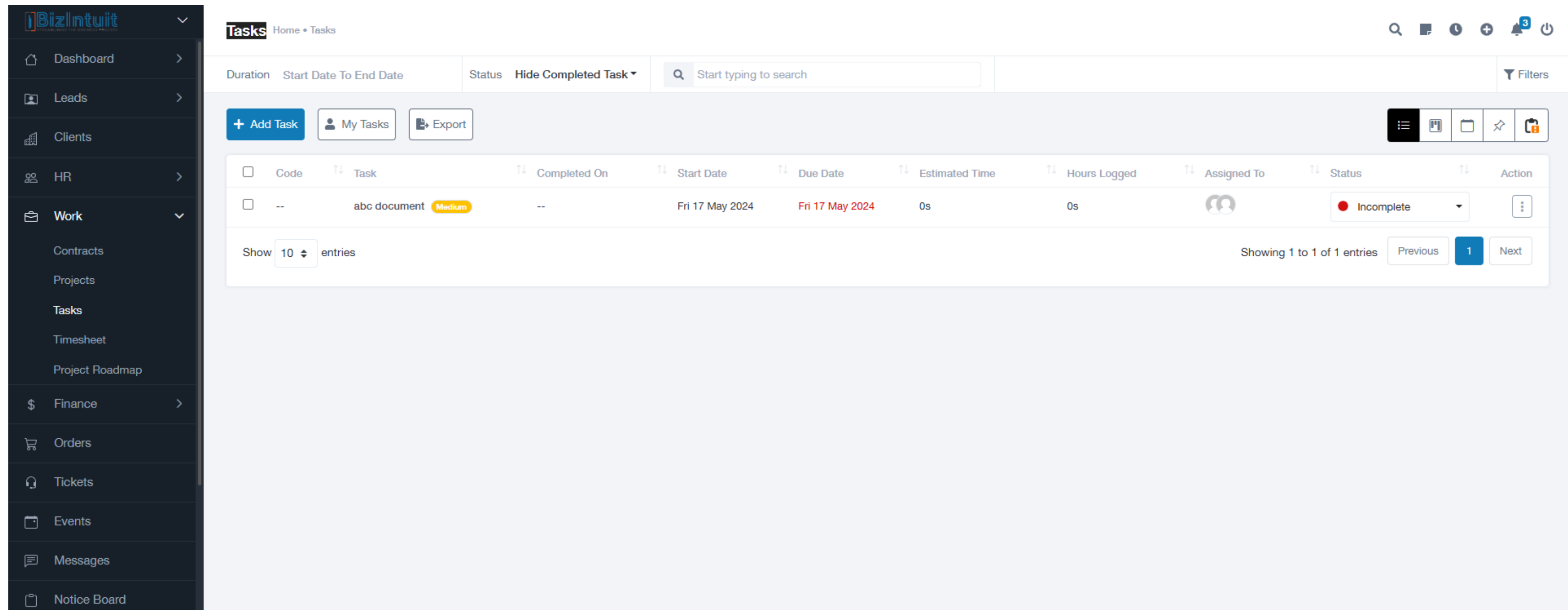
# Projects

In the Projects section, you can add new projects, use existing templates, import and export projects, and track the progress and status of each project.

The screenshot displays the 'Projects' section of the BizIntuit application. On the left is a dark sidebar with navigation links: Dashboard, Leads, Clients, HR, Work (expanded), Contracts, Projects (selected), Tasks, Timesheet, Project Roadmap, Finance, Orders, Tickets, Events, and Messages. The main content area has a header with 'Projects' and a breadcrumb 'Home > Projects'. Below this is a filter bar with 'Duration' (Start Date To End Date), 'Status' (All), 'Progress' (0% - 20%, 21%), and a search input. Action buttons for '+ Add Project', 'Project Template', 'Import', and 'Export' are present. A table with columns 'Code', 'Project Name', 'Members', 'Start Date', 'Deadline', 'Client', 'Status', and 'Action' is shown, but it contains no data. At the bottom, there's a 'Show 10 entries' dropdown and pagination controls indicating 'Showing 0 to 0 of 0 entries'.

# Tasks

In the Tasks section, you can create and manage tasks, assign them to team members, set deadlines, track progress, and prioritize tasks for efficient project management.



# Timesheet

In the Timesheet section, you can track and manage employee work hours, record attendance, generate timesheet reports, and ensure accurate billing and payroll management.

The screenshot displays the BizIntuit Timesheet interface. On the left is a dark sidebar with navigation links: Dashboard, Leads, Clients, HR, Work (expanded), Contracts, Projects, Tasks, Timesheet, Project Roadmap, Finance, Orders, and Tickets. The main content area is titled 'Timesheet' and includes a search bar, filters, and a table of entries. The table has columns for #, Code, Task, Employee, Start Time, End Time, Total Hours, Earnings, and Action. It shows 'No data available in table' and a pagination bar indicating 'Showing 0 to 0 of 0 entries'. A 'Log Time' modal is open, showing 'TimeLog Details' with fields for Project, Task, Employee, Start Date, Start Time, End Date, End Time, Memo, and Total Hours. The 'Total Hours' field shows '0 hrs'. The modal has 'Save' and 'Cancel' buttons.

**Timesheet** Home • Timesheet

Duration Start Date To End Date Employee All  Filters

[+ Log Time](#) [Export](#)

<input type="checkbox"/>	#	Code	Task	Employee	Start Time	End Time	Total Hours	Earnings	Action
No data available in table									

Show 10 entries Showing 0 to 0 of 0 entries [Previous](#) [Next](#)

**Log Time**

**TimeLog Details**

Project  Task  Employee

Start Date  Start Time  End Date  End Time

Memo  Total Hours **0 hrs**

[✓ Save](#) [Cancel](#)

# Project Roadmap

In the Project Roadmap section, you can plan and visualize project timelines, set key milestones, track progress, and manage deliverables to ensure timely project completion.

BizIntuit

Dashboard

Leads

Clients

HR

Work

Finance

- Proposal
- Estimates
- Invoices
- Payments
- Credit Note
- Expenses
- Bank Account
- E-Invoice

Orders

Tickets

Events

Messages

Notice Board

Project Roadmap

Home • Project Roadmap

Duration

Start Date To End Date

Status

All

Progress

0% - 20%, 21

Start typing to search

Filters

Export

Code	Project Name	Members	Start Date	Deadline	Client	Progress	Status	Action
No data available in table								

Show

10

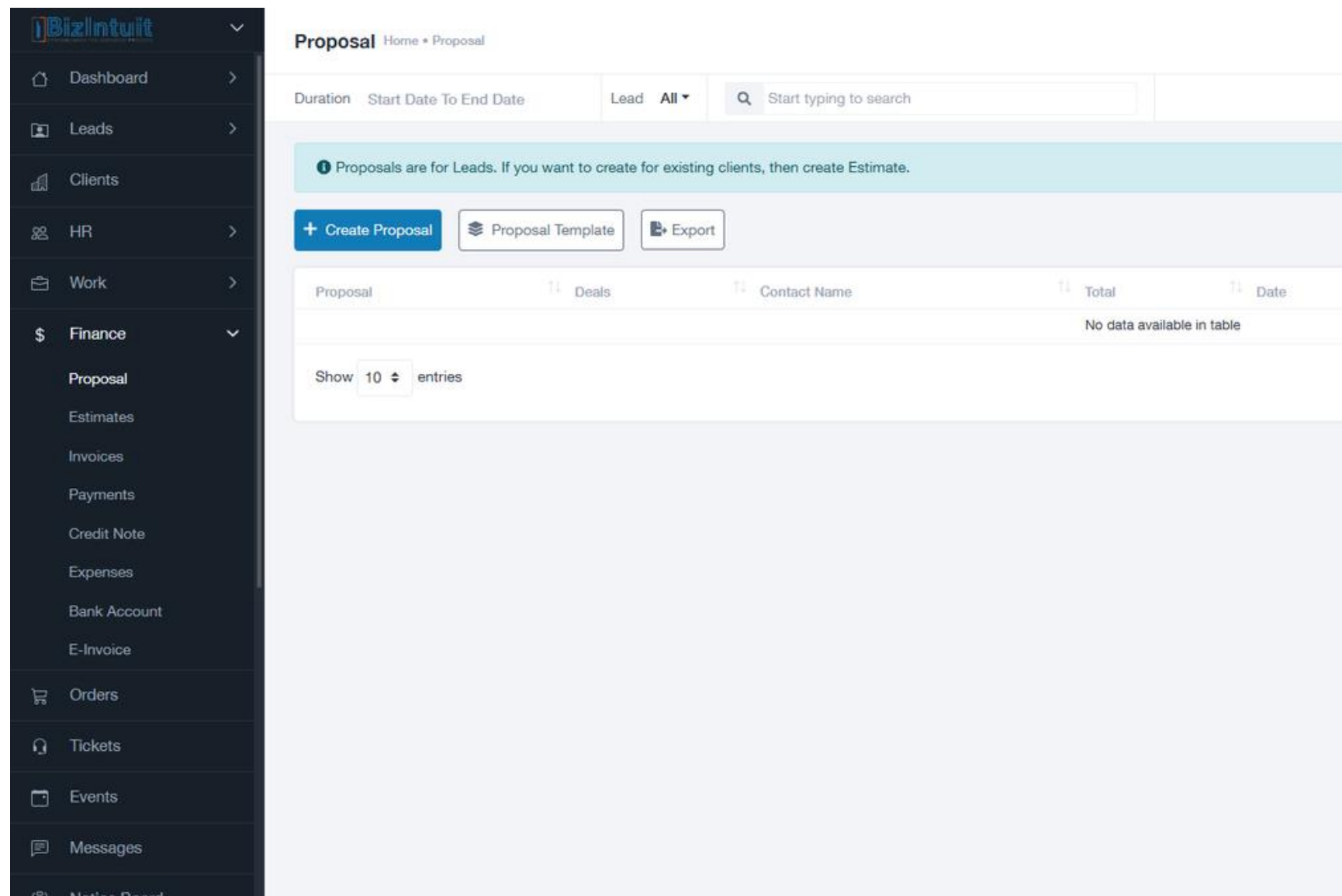
entries

Showing 0 to 0 of 0 entries

Previous

Next

# Finance



Under the Finance section, you can manage:

- Proposals
- Estimates
- Invoices
- Payments
- Credit Notes
- Expenses
- Bank Accounts
- E-Invoices

# Proposal

Proposals are specifically for leads, while estimates should be created for existing clients. Let me know if you need further customization or clarification. You can now create and export proposals.

The screenshot displays the 'Proposal' management page in the BizIntuit application. On the left is a dark sidebar with navigation links: Dashboard, Leads, Clients, HR, Work, Finance (expanded), Orders, Tickets, Events, and Messages. The 'Finance' section is active, showing sub-links for Proposal, Estimates, Invoices, Payments, Credit Note, Expenses, Bank Account, and E-Invoice. The main content area is titled 'Proposal' and includes a breadcrumb 'Home > Proposal'. At the top right of the main area are icons for search, a square, a clock, a plus, a notification bell with '3', and a power button. Below these is a filter bar with 'Duration', 'Start Date To End Date', 'Lead' (set to 'All'), a search input 'Start typing to search', and a 'Filters' button. A light blue informational banner states: 'Proposals are for Leads. If you want to create for existing clients, then create Estimate.' Below the banner are three buttons: '+ Create Proposal', 'Proposal Template', and 'Export'. A table with columns 'Proposal', 'Deals', 'Contact Name', 'Total', 'Date', 'Valid Till', 'Status', and 'Action' is shown, but it contains no data, displaying 'No data available in table'. At the bottom of the table area, there is a 'Show 10 entries' dropdown and pagination controls showing 'Showing 0 to 0 of 0 entries' with 'Previous' and 'Next' buttons.

# Estimates

In the Estimates section, you can create, manage, and export estimates for existing clients. You can also customize the estimates with detailed pricing, terms, and service descriptions.

The screenshot displays the BizIntuit web application interface, specifically the 'Estimates' section. On the left is a dark sidebar with the BizIntuit logo and a list of navigation items: Dashboard, Leads, Clients, HR, Work, Finance (expanded), Orders, Tickets, and Events. The 'Finance' menu is open, showing sub-items: Proposal, Estimates, Invoices, Payments, Credit Note, Expenses, Bank Account, and E-Invoice. The main content area is titled 'Estimates' with a breadcrumb 'Home > Estimates'. It features a search bar, filter buttons for 'Duration', 'Start Date To End Date', and 'Status' (set to 'All'), and a search input field. Below these are three action buttons: '+ Create Estimate', 'Estimate Template', and 'Export'. A table header lists columns: Estimate, Client, Total, Valid Till, Created, Estimate Request Number, Status, and Action. The table body is empty, displaying 'No data available in table'. At the bottom, there is a pagination control showing 'Showing 0 to 0 of 0 entries' with 'Previous' and 'Next' buttons.

# Invoices

In the Invoices section, you can create, manage, and export invoices, customize them with payment terms, itemized charges, and due dates, and track payment statuses for clients.

The screenshot displays the 'Invoices' section of the BizIntuit application. On the left is a dark sidebar with navigation links: Dashboard, Leads, Clients, HR, Work, Finance (expanded), Orders, Tickets, and Events. The 'Finance' menu includes Proposal, Estimates, Invoices (highlighted), Payments, Credit Note, Expenses, Bank Account, and E-Invoice. The main content area has a header with 'Invoices' and a breadcrumb 'Home > Invoices'. Below this is a filter bar with 'Duration' (Start Date To End Date), 'Client' (All), and a search input. Action buttons include '+ Create Invoice', 'Recurring Invoice', '+ Create TimeLog Invoice', and 'Export'. A table with columns Code, Invoice, Project, Client, Total, Invoice Date, Status, and Action is shown, containing the message 'No data available in table'. At the bottom, it says 'Showing 0 to 0 of 0 entries' with 'Previous' and 'Next' buttons.

# Payments

In the Payments section, you can track and manage incoming payments, record payment details, mark invoices as paid, & generate payment reports for accurate financial tracking.

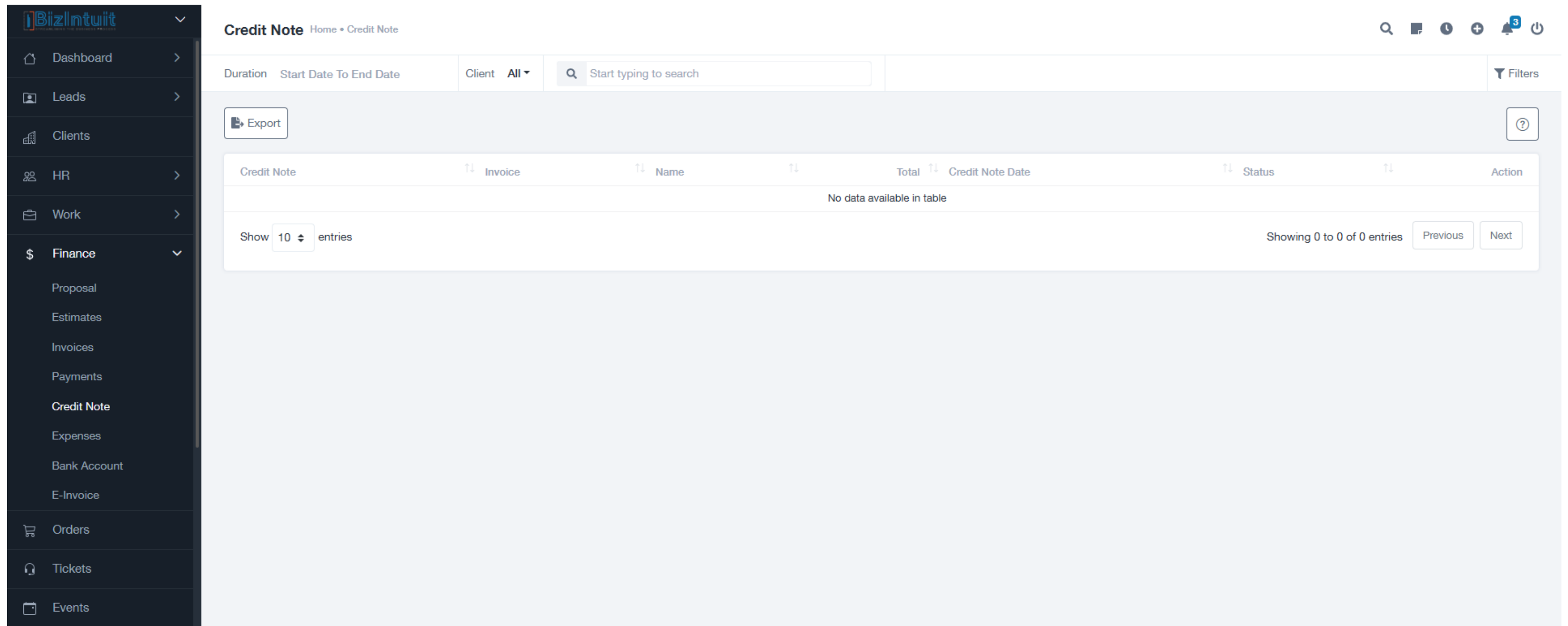
The screenshot displays the iBizIntuit Payments section. The main interface includes a sidebar with navigation options: Dashboard, Leads, Clients, HR, Work, Finance (selected), Proposal, Estimates, Invoices, Payments, Credit Note, Expenses, Bank Account, E-Invoice, Orders, Tickets, Events, Messages, and Notice Board. The main content area shows the Payments section with filters for Duration, Start Date To End Date, and Client (All). It includes buttons for '+ Add Payment', '+ Add Bulk Payment', and 'Export'. A table with columns for Code, Project, Invoice#, Client, and Order# is visible, with a 'Show 10 entries' option.

Two modals are shown:

- Add Payment Modal:** Contains fields for Project, Invoice, Paid On (Mon 02 Dec 2024), Amount (e.g. 10000), Currency (INR (₹)), Exchange Rate (85), Transaction Id (Enter transaction ID of the payment), Payment Gateway, Bank Account, and a Receipt icon.
- Add Bulk Payment Modal:** Includes a 'Filter invoices by client' dropdown, a 'Select Payment Method' dropdown, and a table with columns: Invoice Number #, Payment Date, Payment Method, Offline Payment Methods, Bank Account, Transaction Id, Amount Received, and Invoice Balance Due. The table currently shows '- No record found, -' and a 'Cancel' button.

# Credit Note

you can create and manage credit notes, apply them to specific invoices, adjust amounts for returned goods or overpayments, & export credit note details for financial record-keeping.



# Expenses

you can track and manage both regular and recurring expenses, categorize them, and export expense records for financial analysis and reporting.

The screenshot displays the iBizIntuit web application interface. On the left is a dark sidebar with a menu including Dashboard, Leads, Clients, HR, Work, Finance (expanded), Proposal, Estimates, Invoices, Payments, Credit Note, Expenses, Bank Account, E-Invoice, Orders, Tickets, Events, Messages, and Notice Board. The main content area is titled 'Credit Note' and shows a list of entries with columns for Duration, Start Date To End Date, and Client. An 'Export' button is visible. Below the list, there's a 'Show 10 entries' option. Overlaid on this is a modal window titled 'Add Expense'. The modal contains an 'Expense Details' section with fields for Item Name (e.g., Wireless Keyboard), Currency (INR ₹), Exchange Rate (85), and Price (e.g., 10000). It also has fields for Purchase Date (Mon 02 Dec 2024), Employee, Project, Expense Category, Purchased From (e.g., Acme Corporation), and Bank Account. A rich text editor for the Description is present, followed by a 'Bill' section with a file upload area labeled 'Choose a file'. At the bottom of the modal are 'Save' and 'Cancel' buttons.

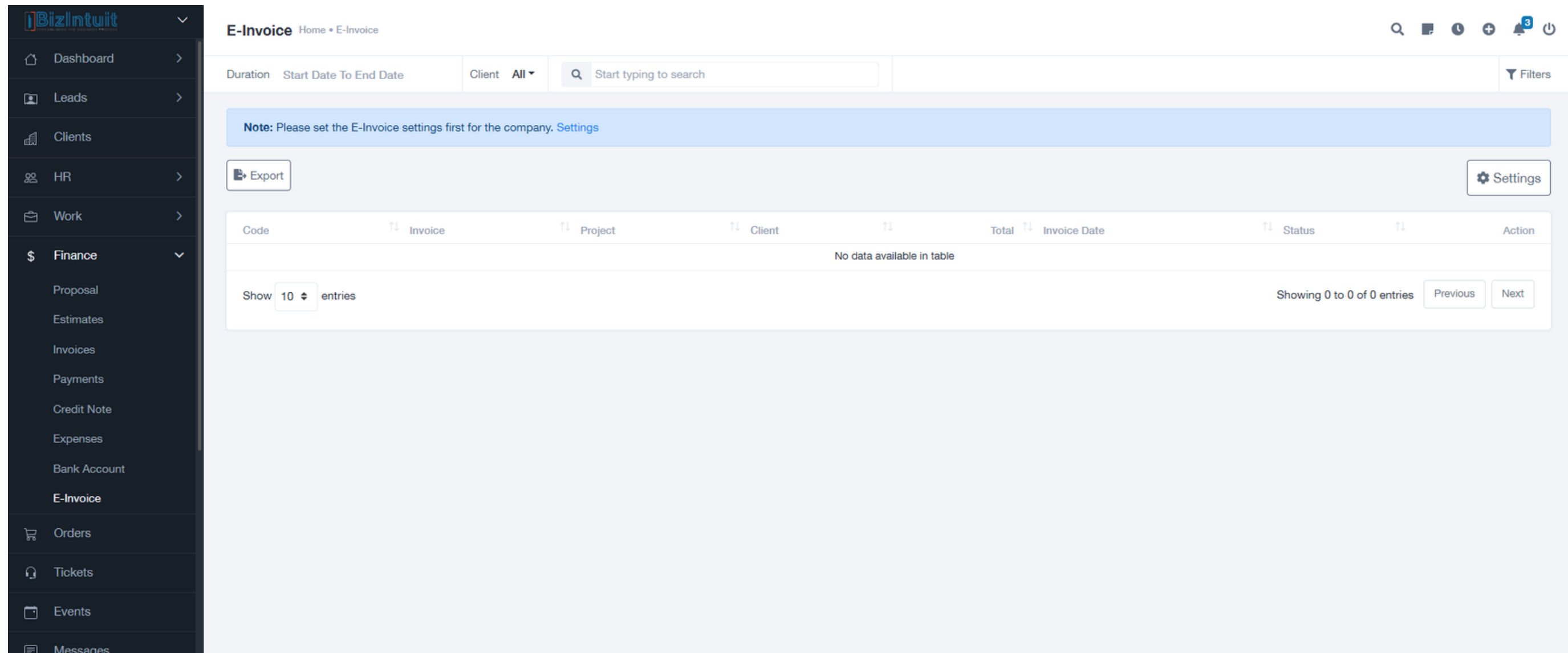
# Bank Account

you can manage and track your business bank accounts, monitor balances, record transactions, and reconcile bank statements for accurate financial management.

The image displays the BizIntuit software interface for managing bank accounts. On the left is a dark sidebar with navigation links: Dashboard, Leads, Clients, HR, Work, Finance (selected), Proposal, Estimates, Invoices, Payments, Credit Note, Expenses, Bank Account, E-Invoice, Orders, Tickets, Events, Messages, and Notice Board. The main content area is titled 'Bank Account' and includes a search bar, a '+ Add Bank Account' button, and an 'Export' button. Below these is a table with columns for 'Bank Account' and 'Account Holder Name'. A 'Show 10 entries' dropdown is visible. An overlay window titled 'Bank Account' is open, showing the 'Add Bank Account' form. This form includes fields for Type (Bank/Cash), Bank Name, Account Holder Name, Account Number, Account Type (Saving), Currency (INR), Contact Number, Opening Balance, and Status. There is also a 'Bank Logo' section with a 'Choose a file' button. At the bottom of the form are 'Save' and 'Cancel' buttons.

# E-Invoice

you can create, send, and manage electronic invoices, ensuring compliance with digital invoicing standards. You can also track the status of e-invoices, including payments and submissions, and export e-invoice records for reporting.



# Orders

In the Orders section, you can manage customer orders, track order statuses, process order shipments, generate invoices, and export order details for inventory and financial tracking.

BizIntuit

Dashboard

Leads

Clients

HR

Work

Finance

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Knowledge Base

Assets

Letter

Payroll

Orders

Home • Orders

Duration Start Date To End Date Client All

Start typing to search

Filters

+ Add New Order

Export

Order Number	Client	Total	Order Date	Status	Action
No data available in table					

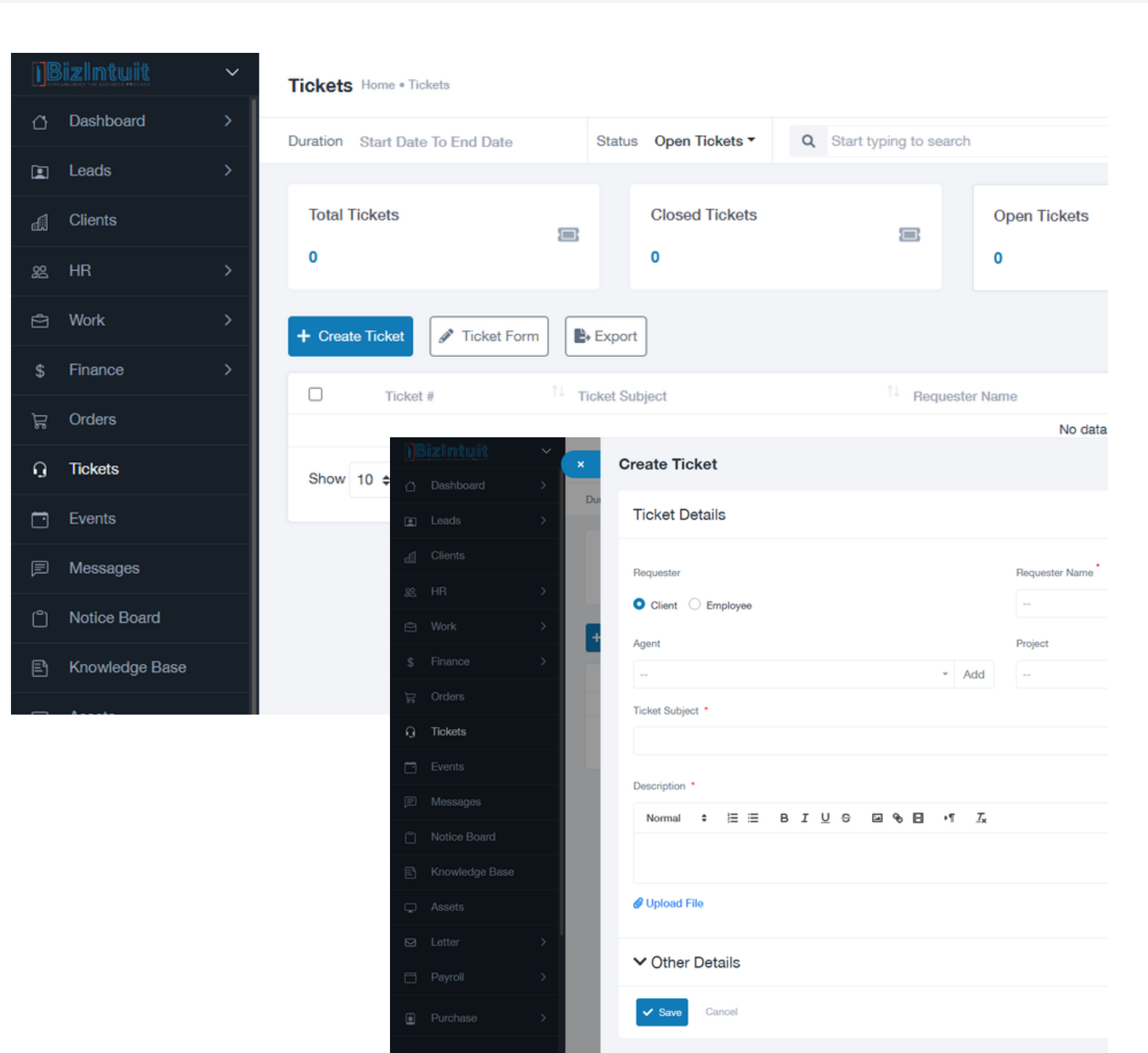
Show 10 entries

Showing 0 to 0 of 0 entries

Previous

Next

# Tickets



In the Tickets section, you can manage:

- Total Tickets: View all tickets submitted.
- Closed Tickets: Track tickets that have been resolved and closed.
- Open Tickets: Monitor tickets that are currently being worked on.
- Pending Tickets: See tickets awaiting action or further review.
- Resolved Tickets: Review tickets that have been addressed and resolved.

# Events

In the Event section, you can create and schedule new events. Add event details such as date, time, location, and description. Export event details for reporting or analysis.

BizIntuit

Dashboard

Leads

Clients

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Events

Messages

Notice Board

Knowledge Base

Assets

Letter

Payroll

Purchase

QR Code

Events

Home • Events

Employee All Client All

Start typing to search

+ Add Event

< > today

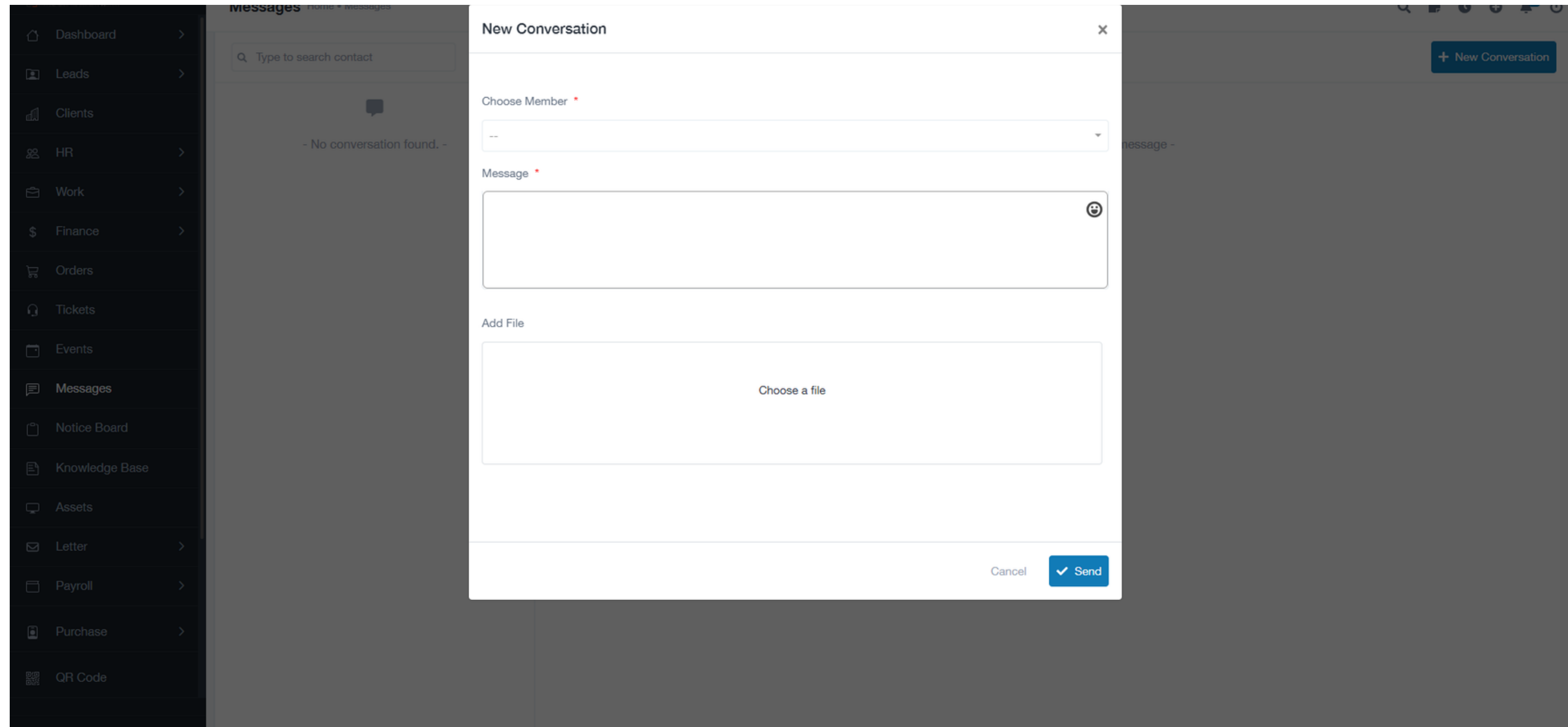
December 2024

month week day list

Mon	Tue	Wed	Thu	Fri	Sat	Sun
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22

# Messages

In the Messages tab, you can view all your messages and start new conversations.



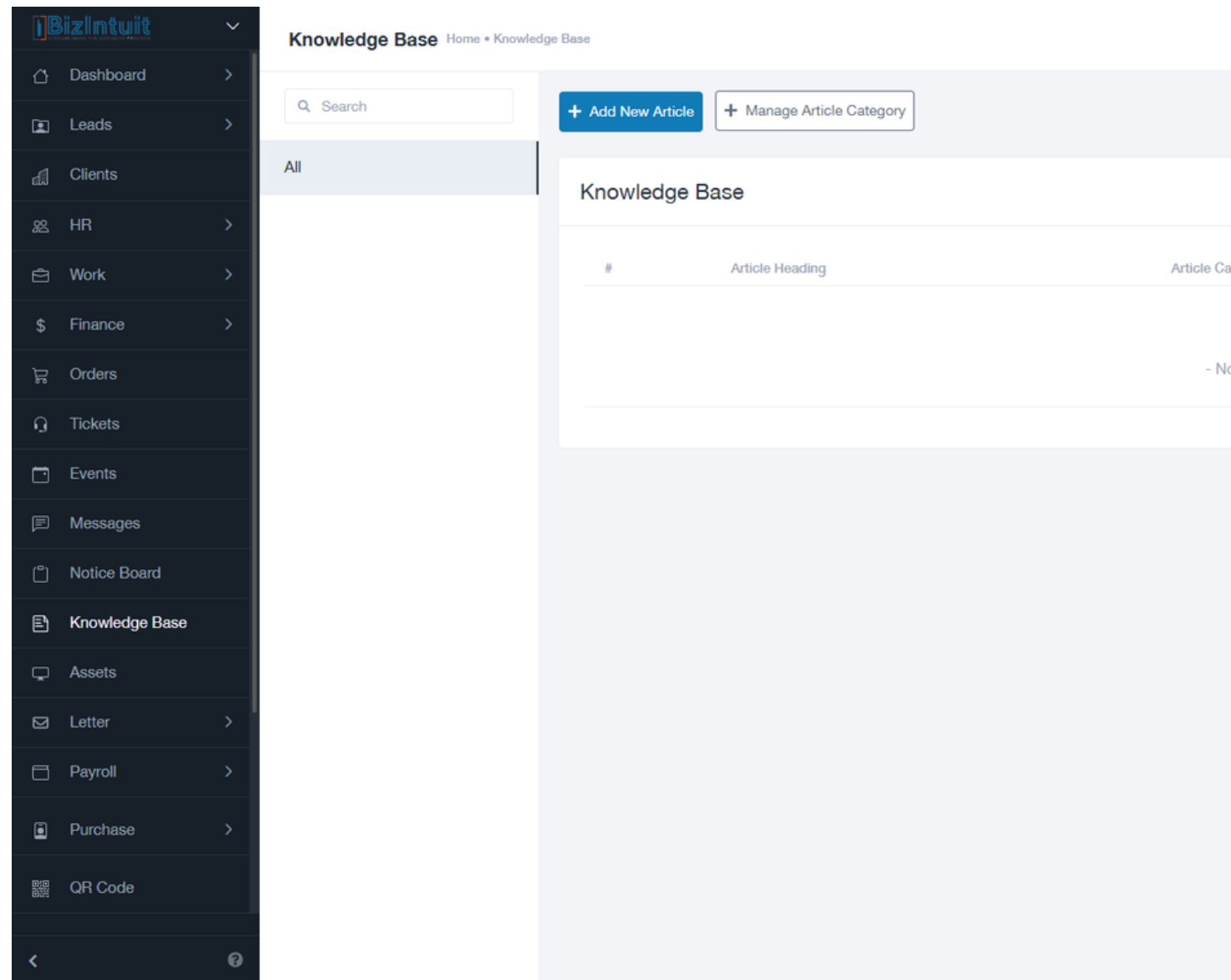
# Notice Board

In the Notice Board section, you can add and export notices

The screenshot displays the BizIntuit Notice Board interface. On the left is a dark sidebar with a menu including Dashboard, Leads, Clients, HR, Work, Finance, Orders, Tickets, Events, Messages, Notice Board (highlighted), Knowledge Base, Assets, Letter, Payroll, Purchase, and QR Code. The main content area has a top navigation bar with 'Notice Board' and 'Home • Notice Board'. Below this is a search bar and filters for 'Duration' and 'Start Date To End Date'. Two buttons, 'Add New Notice' and 'Export', are visible. A table with columns 'Notice', 'Date', 'To', and 'Action' is shown, but it contains no data. An 'Add New Notice' modal is open, featuring a 'Notice Details' section with radio buttons for 'To Employees' (selected) and 'To Clients'. It includes a 'Notice Heading' text field, a 'Department' dropdown, and a 'Select Employee' dropdown. Below these is a rich text editor for the notice content and a file upload section. At the bottom of the modal are 'Save' and 'Cancel' buttons.

# Knowledge Base

The Knowledge Base section typically serves as a repository for frequently asked questions, guides, documentation, and other useful resources.



1. Add Knowledge Base Articles: Create and add articles that contain important information, FAQs, or tutorials for users.
2. Categories & Tags: Organize articles by categories or tags for easy navigation.
3. Search Function: Allow users to search for specific topics or solutions within the knowledge base.
4. Update & Edit: Modify existing articles as needed to keep the information current.
5. Export: Option to export knowledge base content for offline access or reporting.

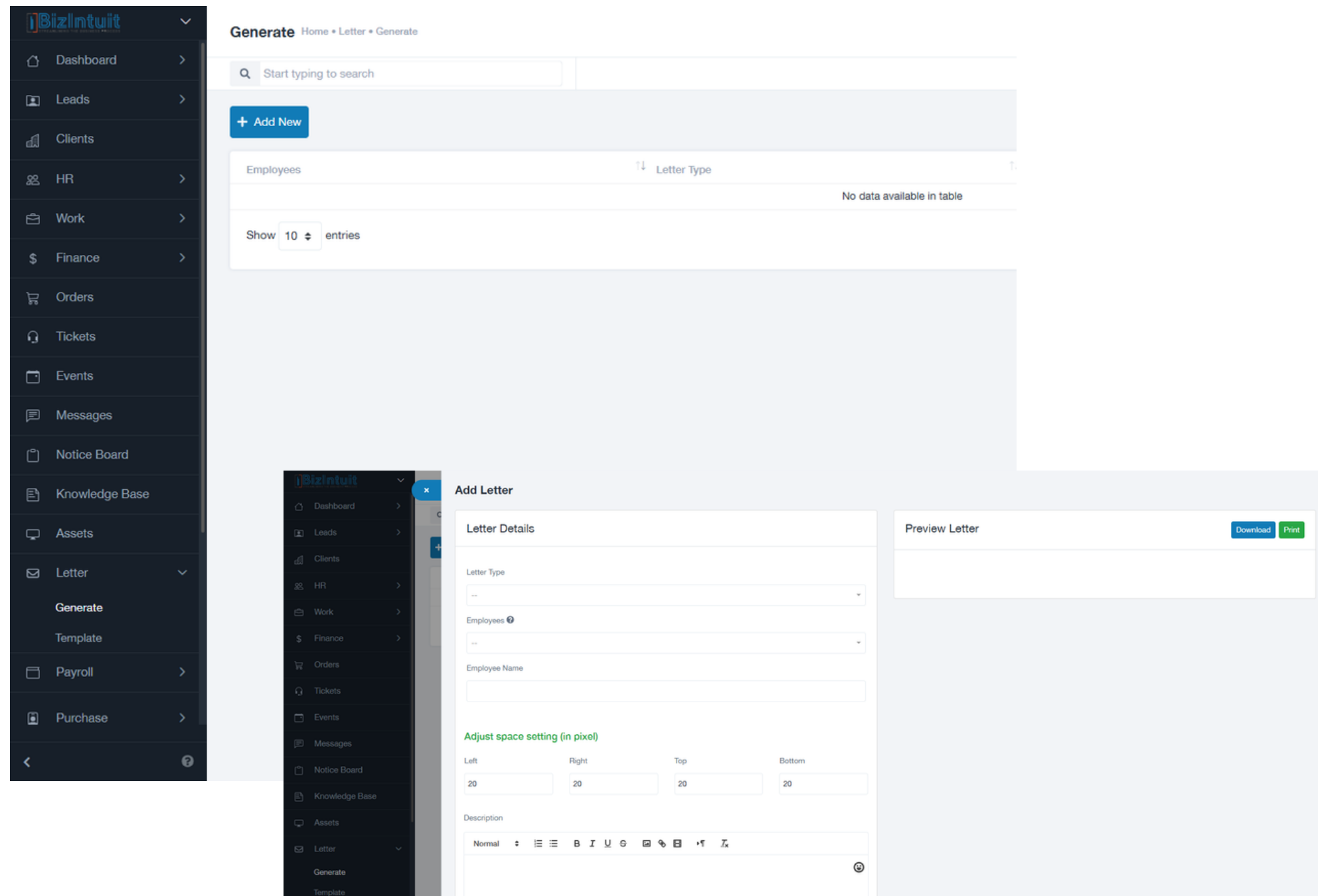
# Assets

In the Assets section, you can add assets.

The screenshot displays the BizIntuit web application's 'Assets' section. On the left is a dark sidebar with navigation links: Dashboard, Leads, Clients, HR, Work, Finance, Orders, Tickets, Events, Messages, Notice Board, Knowledge Base, **Assets**, Letter, Payroll, Purchase, and QR Code. The main content area has a header 'Assets Home • Assets' and a search bar. Below the header are filters for 'Asset Type' (All), 'Employees' (All), and 'Status' (All), along with a search input 'Start typing to search'. Two buttons, '+ Add New Asset' and 'Export', are present. A table with columns '#', 'Asset Picture', 'Asset Name', 'Lent To', 'Status', 'Date', and 'Action' is shown, with a message 'No data available in table'. Below the table is a 'Show 10 entries' dropdown. An 'Add Asset Info' modal is open, containing fields for 'Asset Name' (with example 'e.g. Laptop, iPhone, etc'), 'Serial Number', 'Location', 'Description' (with placeholder 'Enter Description (optional)'), 'Asset Type' (dropdown with 'Add' button), 'Value', and 'Status' (radio buttons: Available, Non Functional, Lost, Damaged, Under Maintenance). An 'Asset Picture' section with a cloud icon and 'Choose a file' text is also present. At the bottom of the modal are 'Save' and 'Cancel' buttons.

# Letter

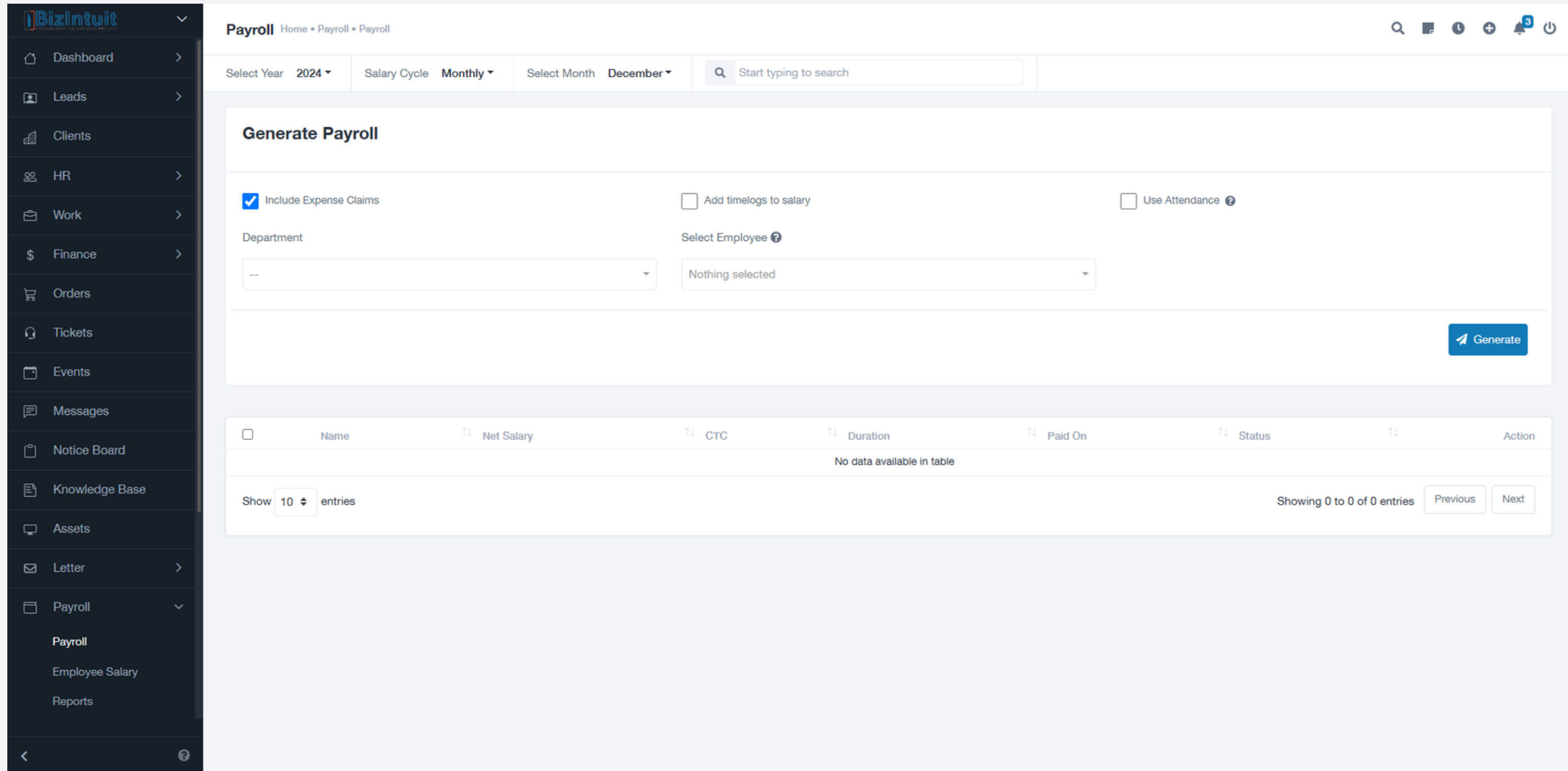
The Letter section typically involves creating formal communication templates, such as business letters, notices, or any other type of letter.



Here's how this could work:

- Generate Letter: Create custom letters based on predefined templates or from scratch.
- Templates: Use or design templates for different types of letters (e.g., official correspondence, invitations, etc.).

# Payroll



# Payroll - Salary

# Employee Salary

**Payroll**
Home • Payroll • Payroll

Designation **All** ▾

Department **All** ▾

Export

Name	Employee Salary Cycle	Salary Group	Allow Payroll Generate	Net Salary (Monthly)	Action
emp5 Developer	Monthly ▾	--	No ▾	--	+ Add Salary
emp2 Developer	Monthly ▾	--	No ▾	--	+ Add Salary
Cloud 365 <span style="background-color: #f0f0f0; padding: 2px;">It's you</span>	Monthly ▾	--	No ▾	--	+ Add Salary

Show 

10

 entries

Showing 1 to 3 of 3 entries
 

Previous

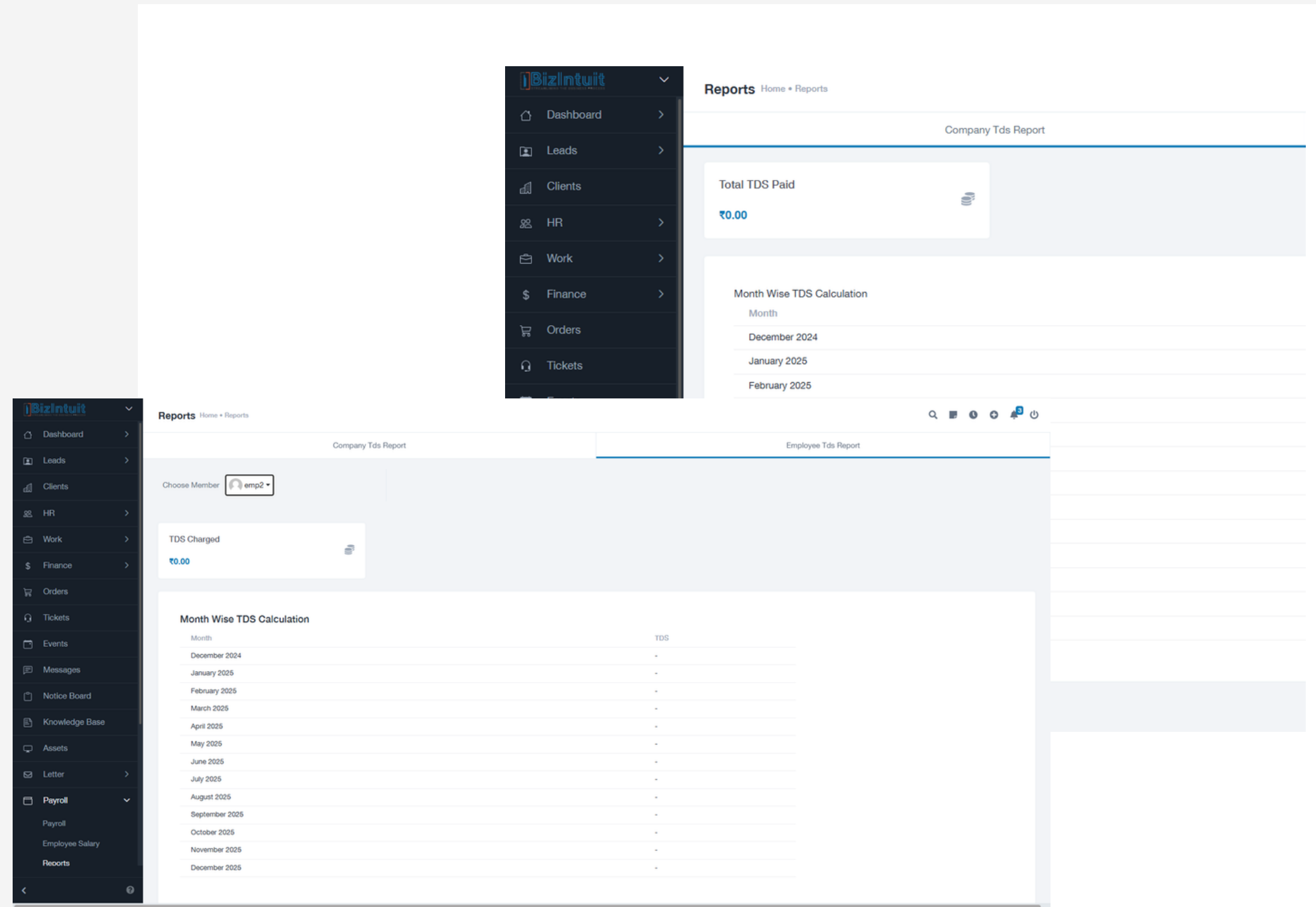
1

Next

# Payroll - Report

Under the Payroll section, you have two types of reports:

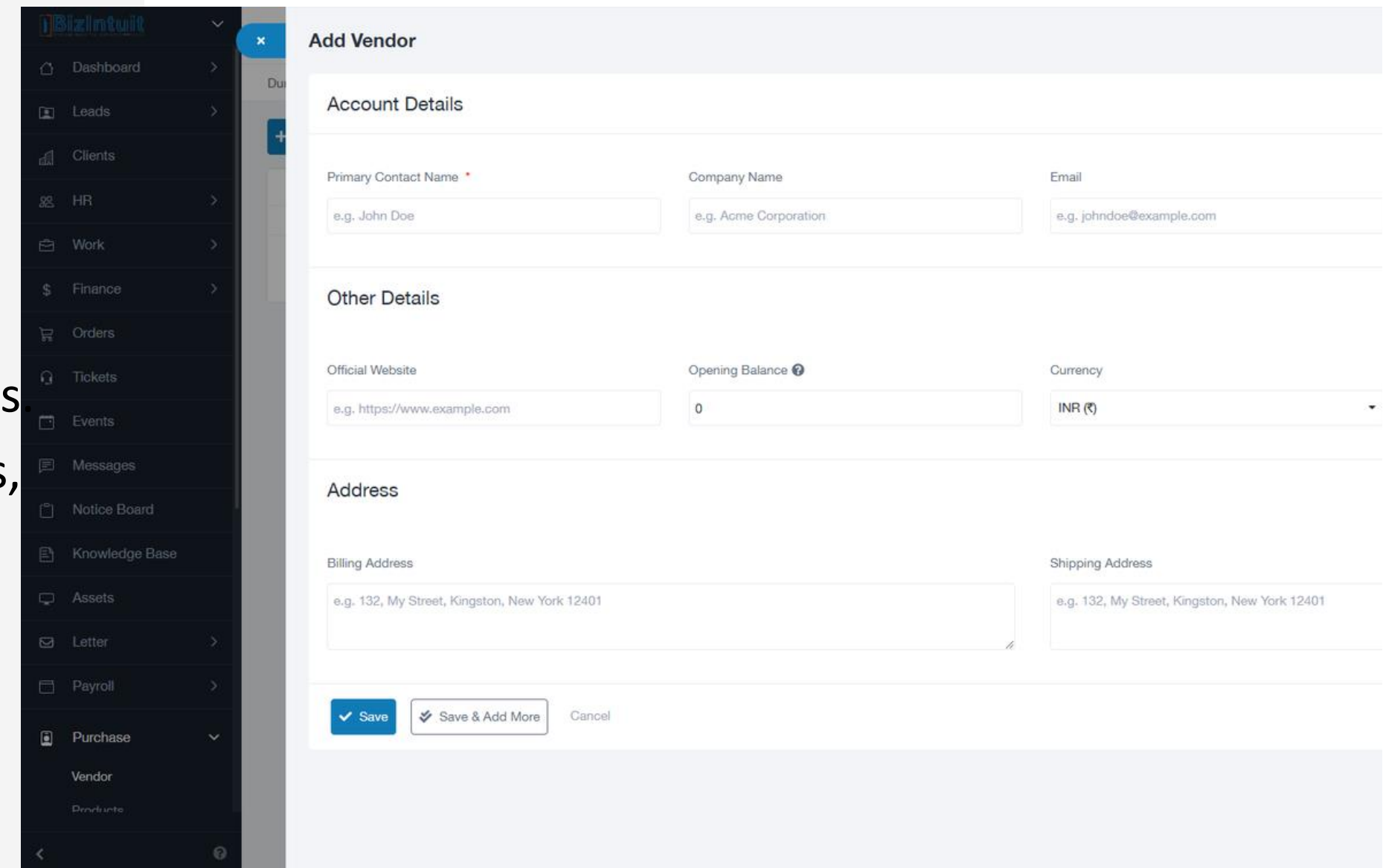
- **Company TDS Report:** This report includes the Tax Deducted at Source (TDS) details for the company, reflecting the taxes withheld from employee salaries and paid to the government.
- **Employee Report:** This report provides salary and payroll details for individual employees, including deductions, bonuses, and tax-related information.



# Purchase

Under the Purchase section, you can manage the following:

- Vendor: Add and manage vendor details.
- Products: Track and manage the products you purchase.
- Purchase Order: Create and manage purchase orders.
- Bills: Record and track bills for purchased products.
- Vendor Payments: Manage payments made to vendors.
- Vendor Credits: Track credits issued by vendors.
- Inventory: Keep track of product stock and inventory levels.
- Reports: Generate reports related to purchases, payments, and inventory.



**Add Vendor**

**Account Details**

Primary Contact Name \* e.g. John Doe Company Name e.g. Acme Corporation Email e.g. johndoe@example.com

**Other Details**

Official Website e.g. https://www.example.com Opening Balance ? 0 Currency INR (₹)

**Address**

Billing Address e.g. 132, My Street, Kingston, New York 12401 Shipping Address e.g. 132, My Street, Kingston, New York 12401

# QR Code

Under the QR Code section, you can create QR codes for various purposes, such as for business information, URLs, product details, or any custom data. These QR codes can be generated, customized, and exported as needed.

BizIntuit

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Assets

Letter

Payroll

Purchase

QR Code

QR Code

Home • Qrcode • QR Code

3

Create QR Code

QR Title \*

Type \*

Text

Message \*

Generate QR Preview

Logo

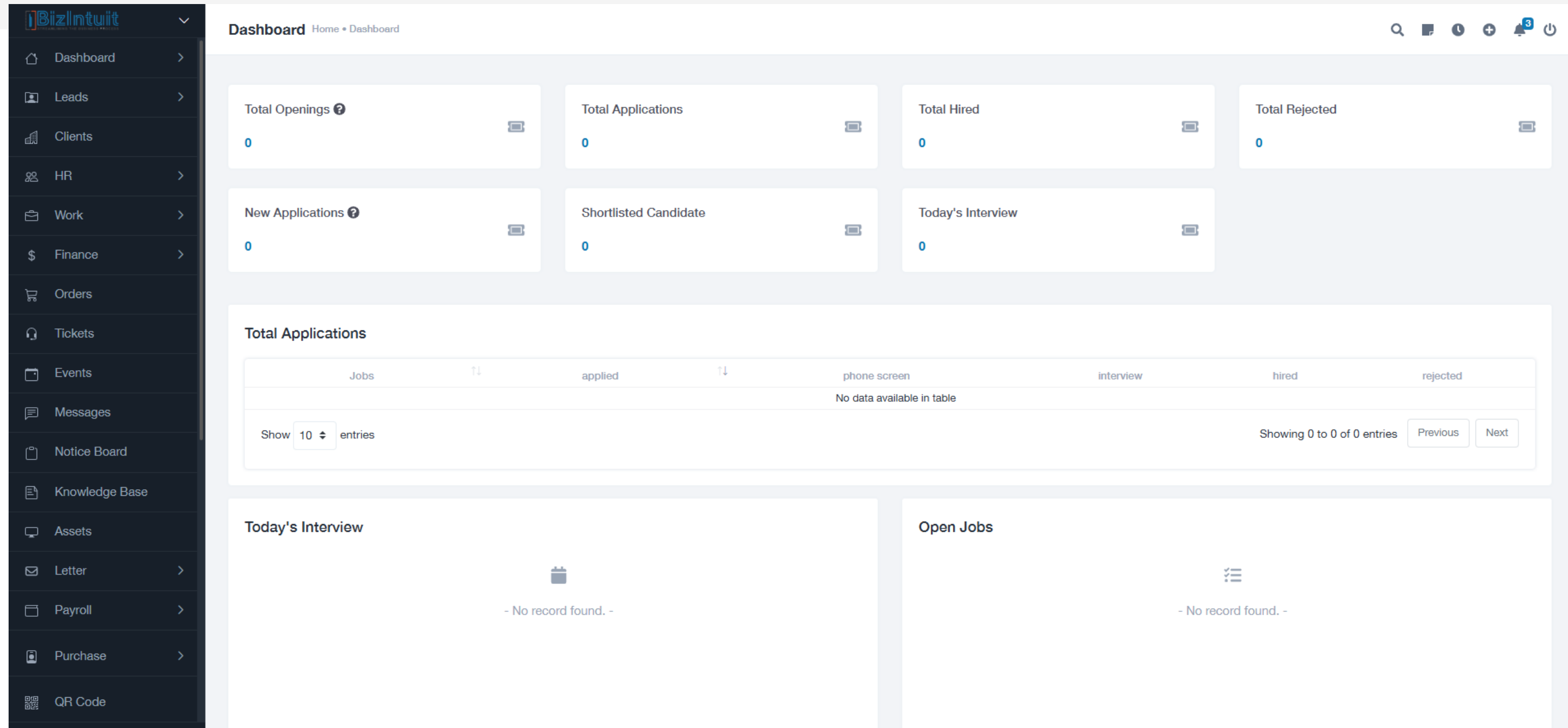
Design

Save

Cancel

# Recruit

Under the Recruit section, you can manage the following:



# Recruit

Under the Recruit section, you can manage the following:

- Dashboard: Overview of recruitment activities and metrics.
- Jobs: Create and manage job listings.
- Job Applications: View and manage candidate applications for posted jobs.
- Interview Schedule: Organize and track interview schedules for candidates.
- Offer Letters: Create and manage offer letters for selected candidates.
- Skills: Manage required skills and qualifications for job roles.
- Candidate Database: Store and organize candidate profiles and details.
- Reports: Generate recruitment-related reports and analytics.
- Career Site: Manage and customize the career page for job postings.

# Recruit - Job

You can add new job postings for different departments. Specify job details such as title, description, skills, qualifications, & department assignment to streamline the recruitment process.

Add Job

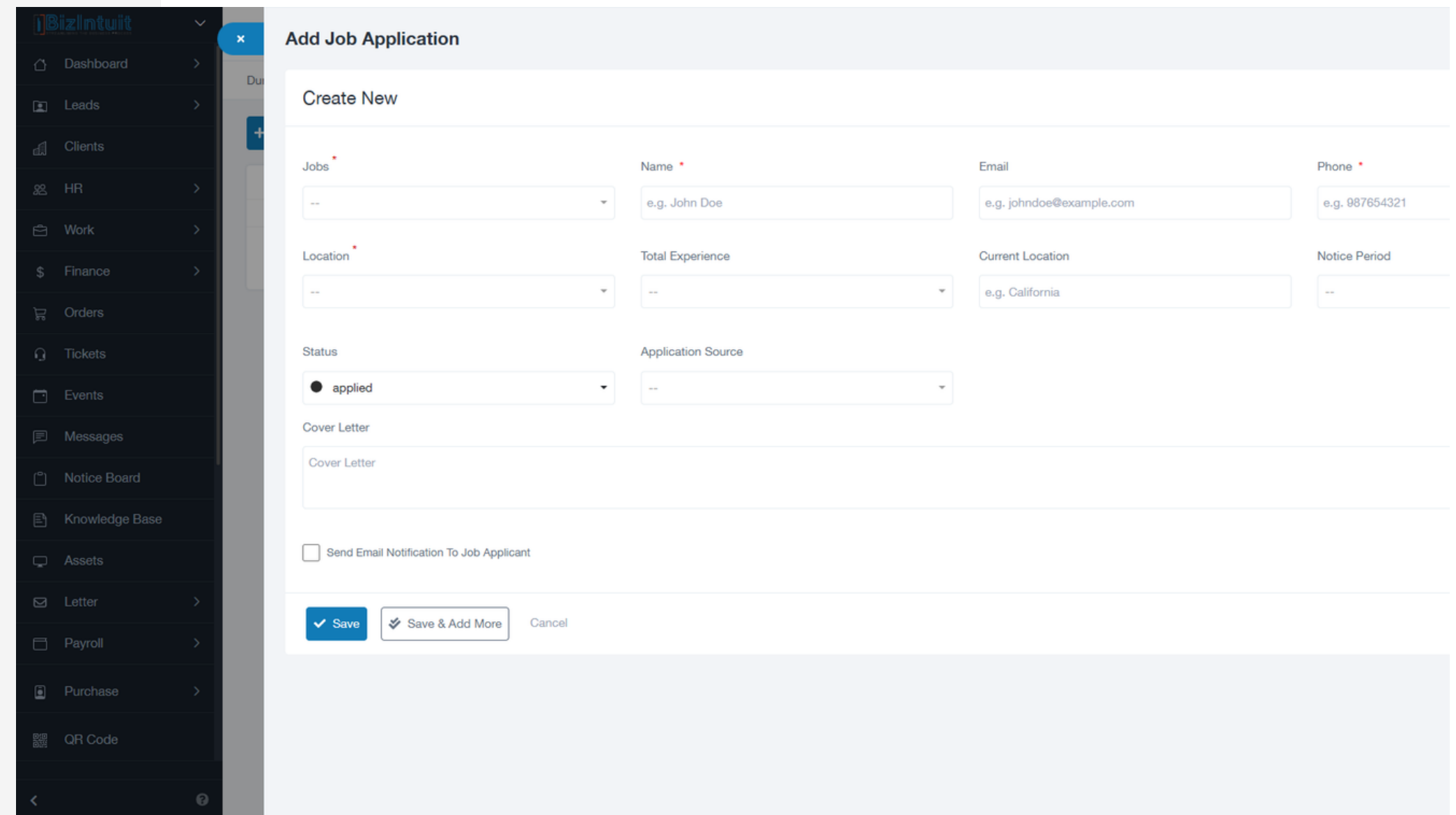
### Job Details

<b>Job Title *</b> <input type="text"/>	<b>Job Category *</b> <div>-- Add</div>	<b>Job Sub Category *</b> <div>-- Add</div>	<b>Department *</b> <div>--</div>
<b>Skills *</b> <div>Nothing selected Add</div>	<b>Location *</b> <div>Nothing selected</div>	<b>Interview Rounds *</b> <div>Nothing selected Add</div>	<b>Start Date *</b> <input type="text"/>
<b>End Date *</b> <input type="text"/>	<input type="checkbox"/> No End Date	<b>Total Openings *</b> <input type="text"/>	<b>Status</b> <div><span style="color: green;">●</span> Open</div>
<b>Recruiter *</b> <div>-- Add</div>	<b>Job Type *</b> <div>-- Add</div>	<b>Work Experience *</b> <div>-- Add</div>	<b>Currency</b> <div>INR (₹)</div>
<b>Show Pay By *</b> <div>--</div>	<input type="checkbox"/> Is this a remote Job?		
<b>Job Description</b> <div style="border: 1px solid #ccc; padding: 5px;"> <div style="font-size: small; margin-bottom: 5px;">             Normal                <span>☰ ☱</span>                B I U                     </div> <div style="height: 100px;"></div> </div>			

**Required Fields ?**

# Recruit - Job Applications

- View and track applications submitted for various job postings.
- Review candidate profiles, resumes, and cover letters.
- Update the status of applications (e.g., shortlisted, interviewed, rejected, or hired).
- Communicate with candidates regarding their application status.
- Organize and filter applications based on job roles, departments, or statuses for efficient management.



The screenshot displays the 'Add Job Application' interface within the BizIntuit system. On the left is a dark sidebar menu with icons and labels for various modules: Dashboard, Leads, Clients, HR, Work, Finance, Orders, Tickets, Events, Messages, Notice Board, Knowledge Base, Assets, Letter, Payroll, Purchase, and QR Code. The main content area is titled 'Add Job Application' and features a 'Create New' section. This section contains several input fields: 'Jobs' (a dropdown menu), 'Name' (text input with placeholder 'e.g. John Doe'), 'Email' (text input with placeholder 'e.g. johndoe@example.com'), 'Phone' (text input with placeholder 'e.g. 087654321'), 'Location' (dropdown menu), 'Total Experience' (dropdown menu), 'Current Location' (text input with placeholder 'e.g. California'), and 'Notice Period' (dropdown menu). Below these are 'Status' (a dropdown menu with 'applied' selected) and 'Application Source' (dropdown menu). A 'Cover Letter' section includes a text area with a placeholder 'Cover Letter'. At the bottom, there is a checkbox for 'Send Email Notification To Job Applicant' and three buttons: 'Save' (with a checkmark icon), 'Save & Add More' (with a plus icon), and 'Cancel'.

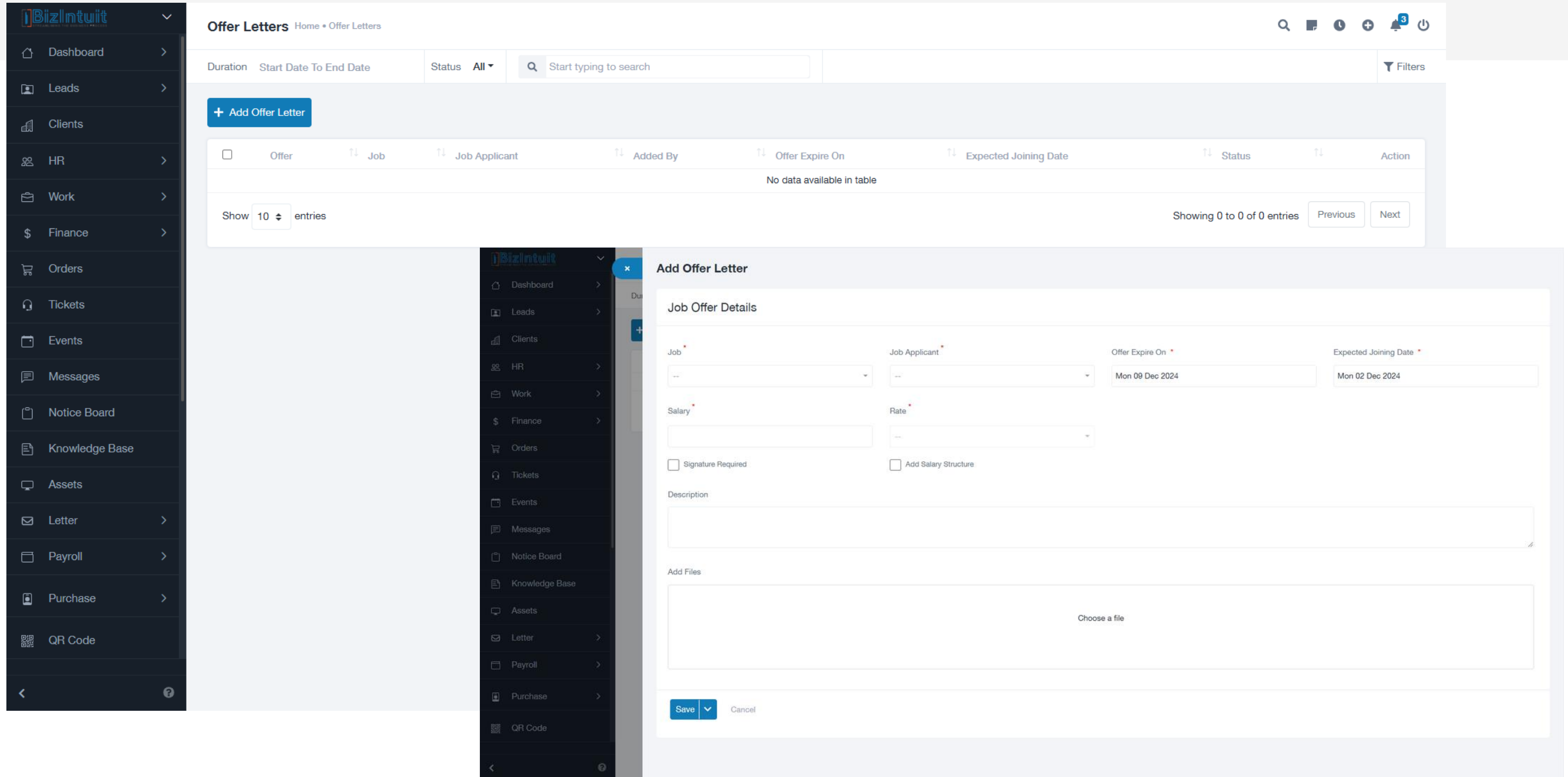
# Recruit - Interview Schedule

- Schedule interviews for candidates with specific time slots and interviewers.
- Notify candidates and interviewers about the scheduled interviews via email or notifications.
- Track upcoming and completed interviews in a calendar or list view.
- Record interview feedback and update the candidate's application status accordingly.
- Reschedule or cancel interviews as needed with automatic notifications.

The screenshot displays the BizIntuit Interview Schedule interface. On the left is a dark sidebar with a menu including Dashboard, Leads, Clients, HR, Work, Finance, Orders, Tickets, Events, Messages, Notice Board, Knowledge Base, Assets, Letter, Payroll, Purchase, and QR Code. The main area is titled 'Interview Schedule' and features a search bar and an 'Add Interview Schedule' button. Below this is a calendar for December 2024, showing dates from 1 to 14. To the right of the calendar is a panel titled 'Interview Schedule' which currently shows 'No upcoming interview.' Below the calendar is a modal form titled 'Add Interview Schedule' with the following fields:

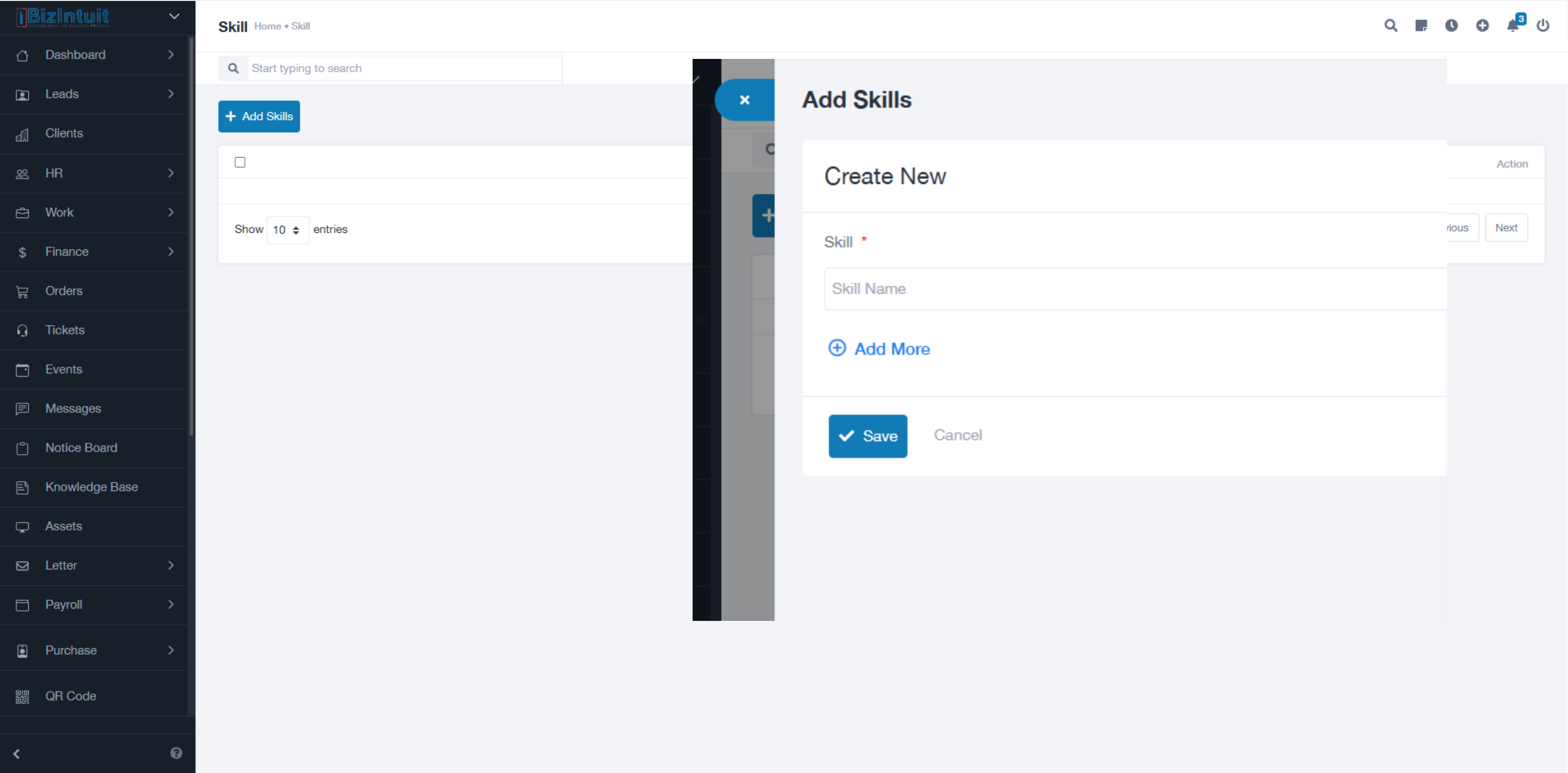
- Interview Details:**
  - Job: (dropdown menu)
  - Candidate: (dropdown menu)
  - Interviewer: (dropdown menu, currently 'Nothing selected')
  - Round: (dropdown menu)
  - Interview Type: (dropdown menu, currently 'In Person')
  - Start On: (date field, currently 'Mon 02 Dec 2024')
  - Start Time: (time field, currently '07:15 PM')
  - Comment for Interviewer: (text area)
  - Comment for Candidate: (text area)
  - Send Reminder: (checkbox, currently unchecked)
- Buttons:** Save, Save & Add More, Cancel

# Recruit - Offer Letters



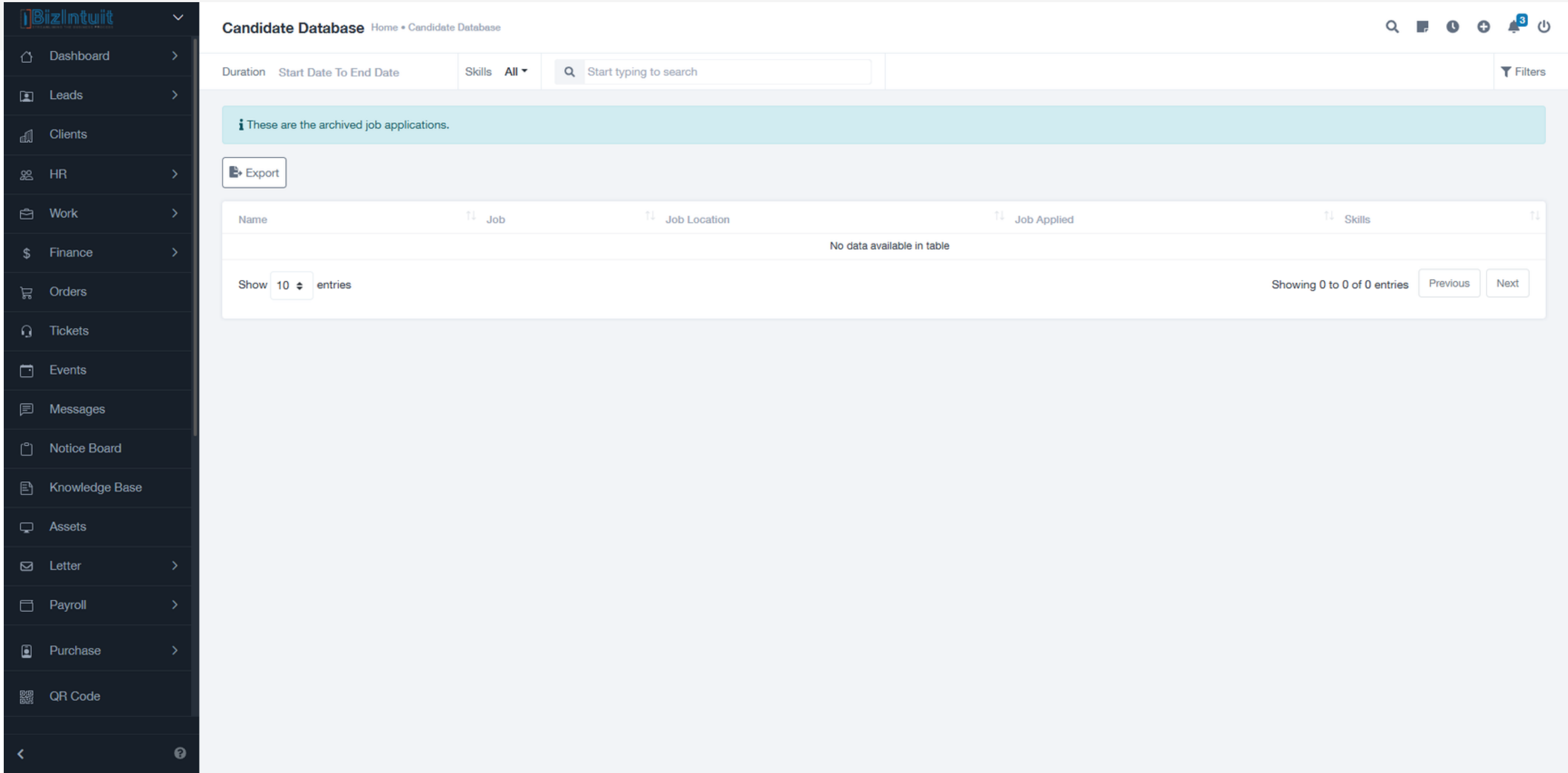
# Recruit - Skills

Add and manage a list of skills required for various job roles.



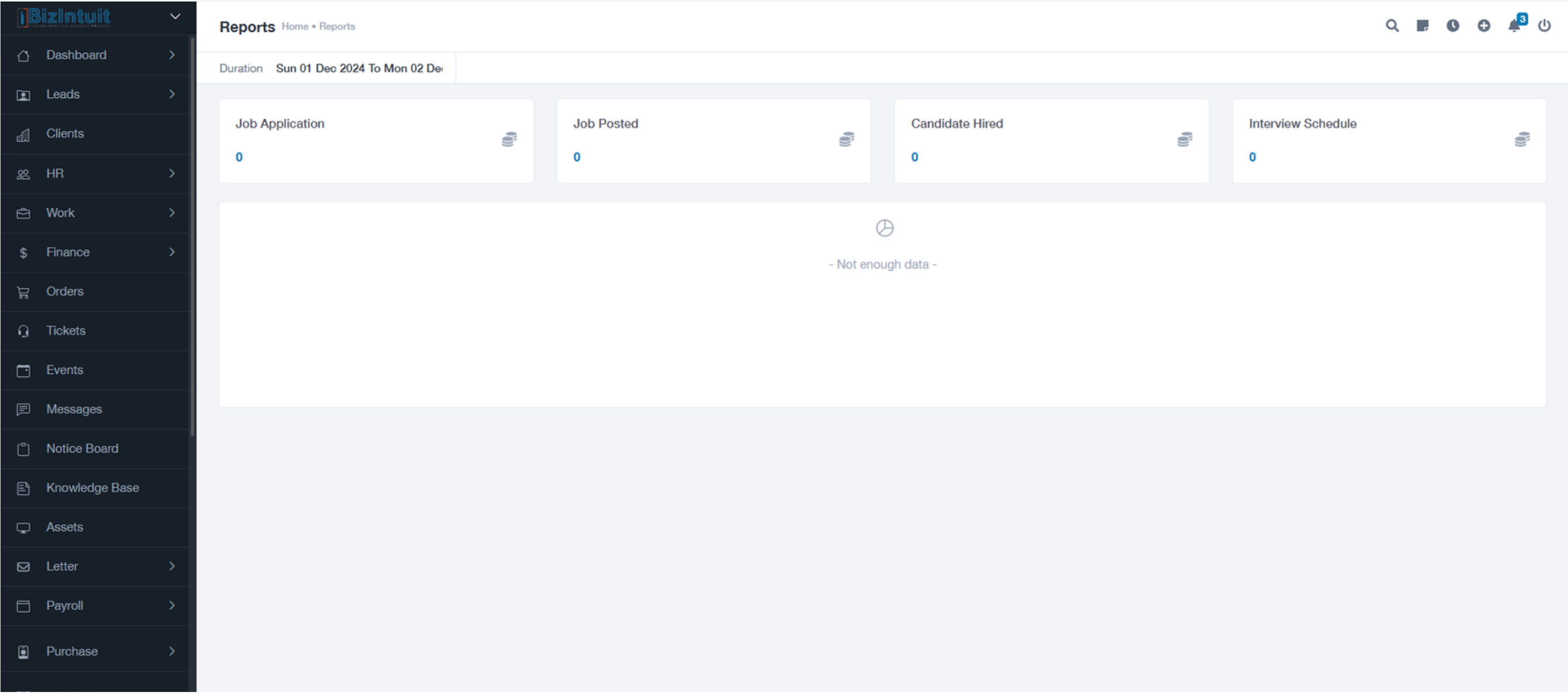
# Recruit - Candidate Database

Manage the Candidate Database and export it as a spreadsheet.




# Recruit - Report

Generate reports for all job applications, providing insights into application statuses, candidate progress, and recruitment metrics.




# Recruit - Career Site

You can create and manage a career site for job postings, showcasing open positions and allowing candidates to apply directly.



Demo Cloud 365

Go To Dashboard



Demo Cloud 365

Jobs

Dummy Company

A leader in innovative solutions

About Us

Dummy Company was founded in 2020 with a mission to provide innovative solutions for a better tomorrow. We have a team of experts in various fields who work together to bring cutting-edge products and services to market. Our focus on quality and customer satisfaction has made us a trusted name in the industry.

Our Products and Services

Product 1: A revolutionary new technology that improves efficiency and productivity

Product 2: A user-friendly platform that simplifies complex processes

Service 1: Customized consulting services to help businesses stay ahead of the curve

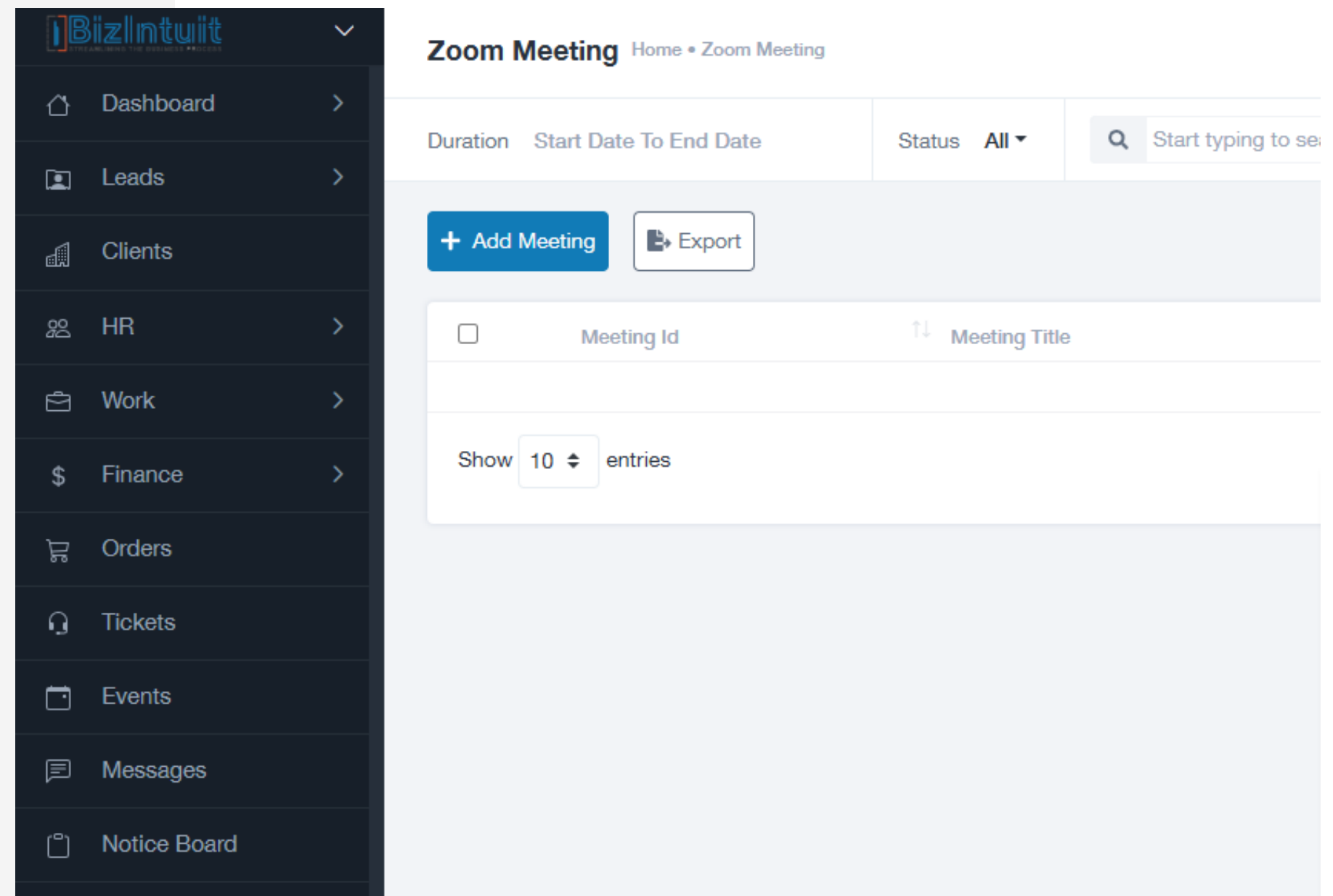
Service 2: Training and support to ensure the successful adoption of our products

Our Team

Dummy Company is powered by a talented and dedicated team of professionals. Our team members bring a diverse set of skills and experiences to the table, allowing us to tackle complex challenges and deliver solutions that truly make a difference. We are committed to fostering a positive and collaborative work environment where everyone has the opportunity to grow and succeed.

# Zoom Meeting

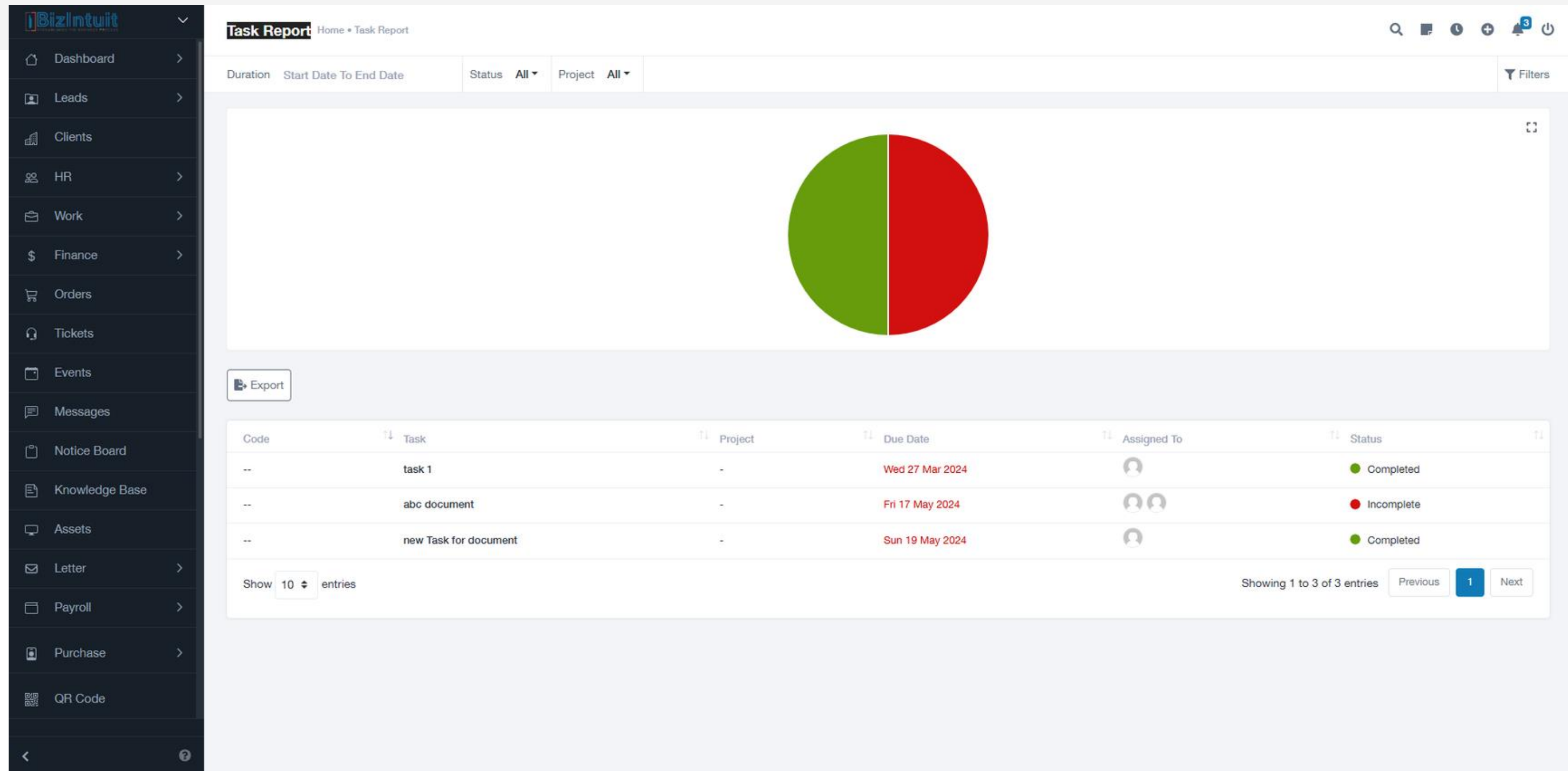
You can schedule and manage Zoom meetings for interviews or discussions with candidates directly within the system.



The screenshot displays the BizIntuit web application interface. On the left is a dark sidebar menu with the BizIntuit logo at the top and a list of navigation items: Dashboard, Leads, Clients, HR, Work, Finance, Orders, Tickets, Events, Messages, and Notice Board. The main content area is titled 'Zoom Meeting' with a breadcrumb 'Home • Zoom Meeting'. It features a filter bar with 'Duration', 'Start Date To End Date', and 'Status' (set to 'All'). A search bar is on the right. Below the filters are two buttons: '+ Add Meeting' and 'Export'. A table is shown with columns 'Meeting Id' and 'Meeting Title'. At the bottom of the table area, it says 'Show 10 entries'.

# Time Report

You can generate and manage task reports, providing insights into task progress, deadlines, and completion statuses.



Code	Task	Project	Due Date	Assigned To	Status
--	task 1	-	Wed 27 Mar 2024		Completed
--	abc document	-	Fri 17 May 2024	 	Incomplete
--	new Task for document	-	Sun 19 May 2024		Completed

Show 10 entries

Showing 1 to 3 of 3 entries

Previous

1

Next

# Time Log Report

Detailed tracking of work hours and time entries for employees.

BizIntuit

Assets

Letter

Payroll

Purchase

QR Code

Recruit

Webhooks

Zoom Meeting

Reports

Task Report

Time Log Report

Finance Report

Income Vs Expense

Leave Report

Attendance Report

Expense Report

Deal Report

Sales Report

Settings

Time Log Report

Home • Time Log Report

Duration

Sun 01 Dec 2024 To Mon 02 Dec 2024

Employee

All

Project

All

Filters

- Not enough data -

Export

Code

Tasks

Employee

Start Time

End Time

Total Hours

Earnings

No data available in table

Show

10

entries

Showing 0 to 0 of 0 entries

Previous

Next

# Finance Report

Financial overview, including income, expenses, and profit analysis.

BizIntuit

Dashboard

Leads

Clients

HR

Work

Finance

Orders

Tickets

Events

Messages

Notice Board

Knowledge Base

Assets

Letter

Payroll

Purchase

QR Code

<

?

Finance Report

Home • Finance Report

Duration

Sun 01 Dec 2024 To Mon 02 Dec 2024

Client

All

Project

All

Total Earnings

₹0.00

Finance Report

- Not enough data -

Export

Project	Invoice	Amount	Amount ( INR )	Paid On	Status
No data available in table					

Show

10

entries

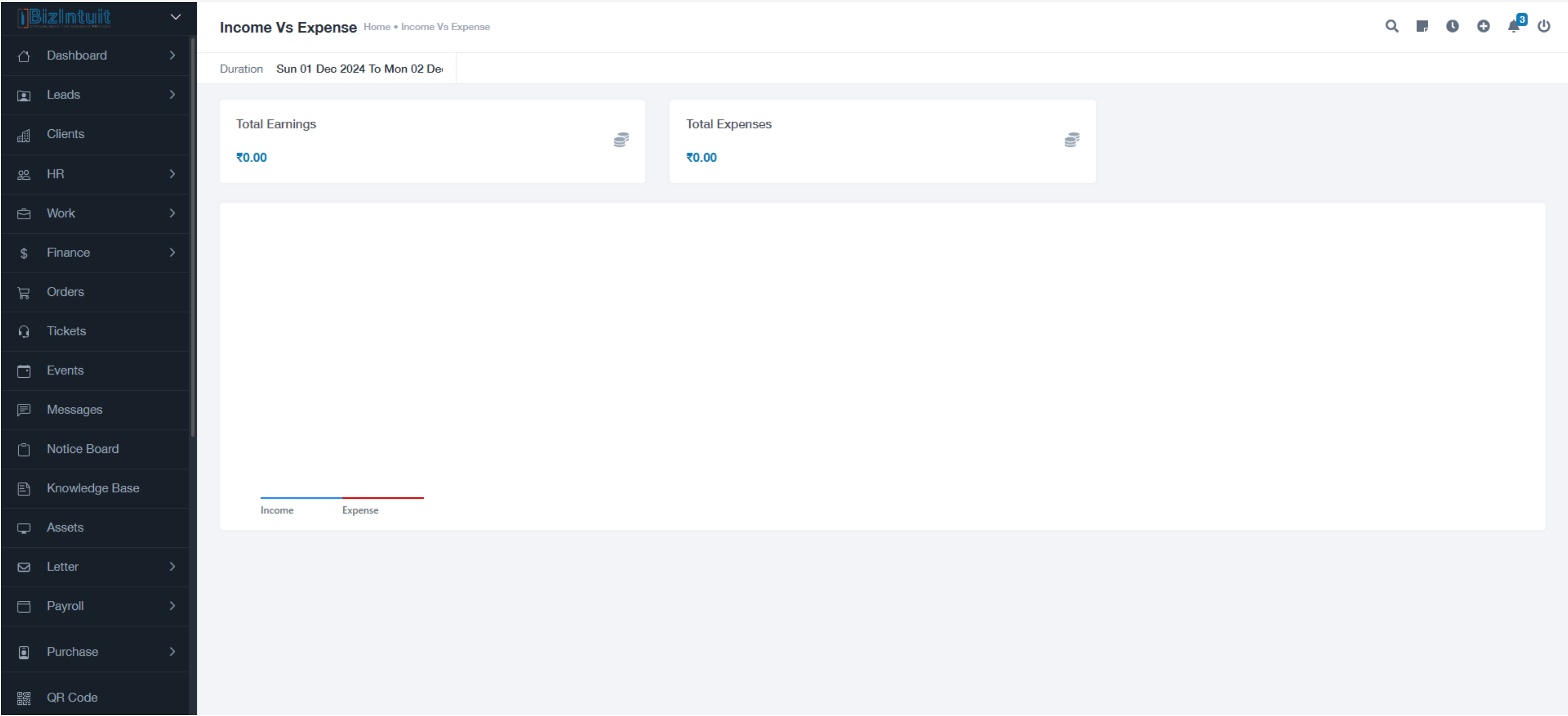
Showing 0 to 0 of 0 entries

Previous

Next

# Income Vs Expense

Comparison of income and expenses to assess financial health.



# Leave Quota Report

Records of employee leave, including types of leave and duration.

BizIntuit

Dashboard

Leads

Clients

HR

Work

Finance

Orders

Tickets

Events

Messages

Notice Board

Knowledge Base

Assets

Letter

Payroll

Purchase

QR Code

Leave Quota Report

Home • Leave Report • Leave Quota Report

3

Employee

All

Year

2024

Export

Employee	Total Leave	Remaining Leaves	Action
<div><div></div><div>Cloud 365</div><div>It's you</div></div>	0.00	0.00	<div>View</div>
<div><div></div><div>Mr emp2</div><div>Developer</div></div>	15.00	15.00	<div>View</div>
<div><div></div><div>Mr emp5</div><div>Developer</div></div>	15.00	15.00	<div>View</div>

Show

10

entries

Showing 1 to 3 of 3 entries

Previous

1

Next

# Attendance Report

Detailed report on employee attendance, absences, and working hours.

BizIntuit

Dashboard

Leads

Clients

HR

Work

Finance

Orders

Tickets

Events

Messages

Notice Board

Knowledge Base

Assets

Letter

Payroll

Purchase

QR Code

Attendance Report

Home • Attendance Report

SearchIconPrintIconClockIconPlusIconBellIconPowerIcon

DurationSun 01 Dec 2024 To Mon 02 Dec 2024EmployeeAll▼

Export

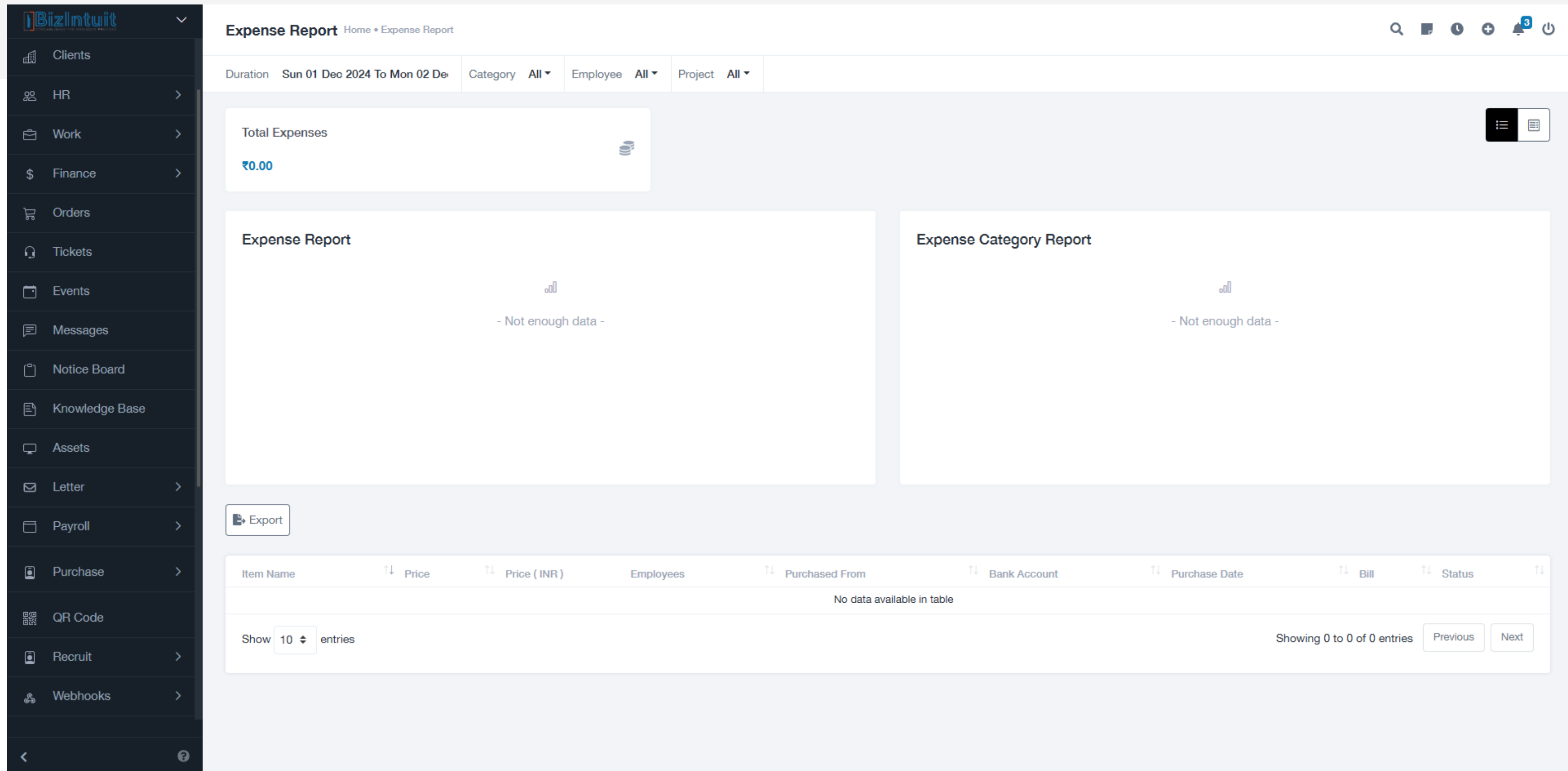
Employee	Present	Absent	Extra Working Days	Hours Clocked	Day(s) Late	Half Day
Mr emp5 Developer	0	2	0	0hrs 0mins	0	0
Mr emp2 Developer	0	2	0	0hrs 0mins	0	0
Cloud 365 <div>It's you</div>	0	2	0	0hrs 0mins	0	0

Show10entries

Showing 1 to 3 of 3 entriesPrevious1Next

# Expense Report

# Overview of company expenses, categorized and summarized.



# Deal Report

Tracking of sales deals, their status, and outcomes.

BizIntuit

REDEFINING THE BUSINESS PROFILE

Dashboard

Leads

Clients

HR

Work

Finance

Orders

Tickets

Events

Messages

Notice Board

Knowledge Base

Assets

Letter

Payroll

Purchase

QR Code

Profile

Home • Profile

Agent report

Deal Report

Duration

Sun 01 Dec 2024 To Mon 02 Dec 2024

Agent

All

Export

Deal Agent	Total Deals	Won Deals	Lost Deals	Total Amount	Converted Amount	Total Follow Up	Total Pending Follow Up
No data available in table							

Show

10

entries

Showing 0 to 0 of 0 entries

Previous

Next

# Sales Report:

Overview of sales performance, including revenue, target achievements, and trends.

BizIntuit

Dashboard

Leads

Clients

HR

Work

Finance

Orders

Tickets

Events

Messages

Notice Board

Knowledge Base

Assets

Letter

Payroll

Purchase

QR Code

Sales Report

Home • Sales Report

3

Duration

Sun 01 Dec 2024 To Mon 02 Dec 2024

Client

All

Export

Paid On	Invoice Number	Client Name	Invoice Value	Amount Paid	Taxable Value	Discount	Bank Account
No data available in table							

Show

10

entries

Showing 0 to 0 of 0 entries

Previous

Next

# Company Settings

- Company name, logo, and contact information.
- Business address and tax-related details.
- Default currency, time zone, and language preferences.
- Customization of templates for invoices, contracts, and reports.
- User permissions and role management for employees and administrators.
- Integration settings with third-party tools or platforms.

**BizIntuit**

Company Settings Home • Company Settings

Search

Company Settings

Business Address

App Settings

Profile Settings

Notification Settings

Currency Settings

Payment Credentials

Finance Settings

Contract Settings

Tax Settings

Ticket Settings

Project Settings

Attendance Settings

Leaves Settings

Custom Fields

Company Name \* ?

Demo Cloud 365

Company Email \*

admin@cloud365.app

Company Phone \*

+91-1234567890

Company Website

https://cloud365.app

Save